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Trade and Industry

26 May 1978

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Trade and Industry

Incorporating the Board of Trade Journal

Volume 31 no. 8.

Pages 401 to 448. 26 May 1978.

Price 40p. Net subscription post inclusive. £30.60.

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ABC Member of the Audit Bureau of Circulations
ISSN 0006-5323

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Trade and Industry this week

HOME

Voluntary emphasis in industrial democracy white paper

Greater employee involvement in making and carrying out company policy is proposed in a white paper, 'Industrial Democracy' (Cmnd 7231), published on Tuesday (23 May).

Produced following extensive public debate and consultation on the Bullock report, the white paper defines industrial democracy as 'the means by which employees at every level may have a real share in decisions within their company or firm and therefore a share in the responsibility for making it a success'.

Announcing the white paper in a statement in the commons, Prime Minister James Callaghan said that its objective was positive partnership rather than defensive coexistence. 'This shared responsibility,' he said, 'should bring improved industrial relations and increase the efficiency of British industry.' Emphasising the voluntary approach to increased participation, the white paper points out that it is not the intention to impose a standard pattern of participation on industry by law. What the government hopes – and expects – is that most developments in participation will take place through participation and co-operation and that 'recourse to the statutory fall-back arrangements will be the exception'.

The white paper recognises that, in many cases, both in the private and public sectors, employees are already involved in the determination of corporate strategy. But, the government believes, this system should be backed up by law.

Two major proposals are put forward. First, that employees in companies of more than 500 people should have a statutory right to have all major proposals affecting the workforce discussed with their employees' representatives before decisions are made. A joint representation committee (JRC) should be set up on an inter-union basis for this purpose. The discussions would include such matters as investment, mergers, takeovers, expansion or contraction of establishments and major organisational changes.

Secondly, where voluntary agreement about employee representation could not be reached, employees in companies of more than 2000 people should have a legal right to appoint one-third of the directors, either to the 'top' board of a new two-tier structure proposed in the white paper, or to the existing unitary board if the company was agreeable.

The new two-tier structure, proposed by the white paper as an option for any company, would, it believes, offer companies certain advantages over unitary boards in the achievement of worker participation. A 'top' board – the policy board – would be responsible for company policy and major decisions. Employee representatives would play a full part in this sitting alongside shareholders' representatives. A separate management board would handle the day-to-day running of the company. Workers' involvement in day-to-day decisions would come through participation arrangements below board level.

The white paper proposes that in companies employing more than 500 people a joint representation committee (JRC) should be set up by the unions. This would provide a basis for inter-union co-operation and act as a stimulus to, and a focus for, the voluntary development of joint discussion of company strategy. Representatives of non-union workers could also participate by agreement. Any minority trade union or other substantial group of workers should have a right of appeal if they felt their interests were not fairly represented.

The JRC's purpose would be to negotiate with the company and to decide how employee representatives should be selected. In the case of board-level representation, the JRC would have the right to require the company to organise a ballot to decide whether employees wanted board representation on either a new two-tier, or existing unitary board.

A period of three to four years from the date of the establishment of the JRC should elapse before the statutory right to board-level representation came into force. This would allow for the necessary improvement of the participative machinery, the white paper says.

On the question of industrial democracy in groups and multinationals, the white paper says that 'arrangements must be made for workers to be involved in decisions at whatever level they are taken'. Because of the complex and varying structures of group organisation, it proposes that further consideration and consultation will be needed on the best way of achieving this for employees in groups of companies, both through consultations on strategy and board-level representation. Similar considerations apply in relation to UK companies forming part of a multinational group. While the legislation will not apply to companies outside UK jurisdiction, the government hopes that overseas companies with subsidiaries in this country 'will seek to operate within the spirit of its proposals'.

The white paper notes that considerable progress is already being made to increase industrial democracy in the nationalised industries. The government has asked the nationalised industries' chairmen to consult with the unions in their industries and to come forward with joint proposals for further improvements. The legislation will give nationalised industries' employees a right to be represented on main boards, but account will have to be taken of the responsibilities of nationalised industries to ministers and parliament.

Assistance for industry raised by £250m

The limit on selective financial assistance under section 8 of the Industry Act 1972 has been raised from £850 million to £1,100 million. The Financial Assistance for Industry (Increase of Limit) Order 1977 was approved by parliament on Monday.

Alan Williams, Minister of State for Industry, told the house that in the past 11 months new commitments for section 8 assistance had totalled £275 million. This was made up of £150 million assistance for the capital reconstruction of British Leyland, £90 million assistance under the sectoral schemes, £20 million assistance under the selective investment scheme, and about £15 million under the offshore supplies scheme.

The sectoral schemes had made a very sizeable impact in the past year. So far offers totalling £141 million had been made for nearly 1300 projects costing £675 million. These offers amounted to over half the total of budgetary allocations of £272.5 million made for the 14 schemes introduced since April 1975. A further 1200 applications were under consideration, and seven of the schemes were still open to applications.

Assistance of £34 million under the selective investment scheme had been approved for 66 projects costing £340 million. This included assistance of £10.5 million for the £100 million Thames Board Mills project. A further 154 projects costing some £1,600 million were under consideration. Many more applications were expected before the closing date of the end of June. It was too early to assess the eventual impact of the scheme, but the projects already approved should lead to an annual 'primary' benefit to the balance of payments of some £200 million from 1982.

Unemployment figures fall

Seasonally adjusted unemployment figures for Great Britain, excluding school leavers, fell by 19 600 from the 13 April figure, the Department of Employment announced on Tuesday (23 May), and stand at 1 306 800. The total number of unemployed in Britain on 11 May, including 44 688 school leavers under 18, was 1 324 866 – 5.7 per cent of the total number of employees.

In the last three months the department says there has been a decrease of 14 000 unem-

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MANAGEMENT SELECTION

ployed on average each month. Of the total unemployed in Great Britain, 185 000 had been unemployed for four weeks or less. It is estimated that about 1 016 000 were unemployed for more than four weeks, and were aged under 60.

The average number joining the unemployment register in the three months ending April was 358 000 per month compared with 358 000 in the three months ending January and 386 000 in the three months ending October 1977. The average numbers leaving the register in these three periods were 375 000, 357 000 and 379 000 per month respectively.

BSO cuts down on forms

As a result of a stringent review, nearly 9000 fewer forms will be sent out each year to businesses – mostly small firms – states the first report of the Business Statistics Office (BSO), published on Monday.

Welcoming the report, Leslie Huckfield, Parliamentary Under-Secretary of State, Department of Industry, said that government must have adequate information on which to base its decisions, quite apart from the many uses which statistics had outside government. But equally he was conscious of the cost in terms of time and money which government forms caused to businesses and particularly to small firms.

Towards making form-filling simpler, Mr Huckfield said that a personalised form scheme had been run by BSO on a pilot basis and was expected to be introduced fully for all quarterly inquiries in 1979. Each form-filler would be given only the headings he had filled up before. This meant that about 90 per cent of firms would receive only a single page personalised form. Another example was the simplification of forms for retailing inquiries. The one for small businesses has been reduced from 16 to 4 pages and that for medium-size businesses from 20 to 6 pages.

The report shows that the number of forms sent out by BSO has fallen from 640 000 in 1975 to about 470 000 in 1977.

Earlier on Monday, the Confederation of British Industry published its own report on the provision of statistics. It said later that it welcomed the efforts being made by BSO.

'Business Statistics Office Report for 1977' is available free from the Library, Business Statistics Office, Cardiff Road, Newport.

Next week, *Trade and Industry* is to publish a special report on BSO.

EEC elections: UK constituencies proposed

Provisional recommendations by the Boundary Commissions for England and Wales for the division of both countries into European assembly constituencies were published on Sunday (21 May). Details of the parliamentary constituences which the commissions propose to include within each assembly constituency – 66 for England and four for Wales – were published this week in the national press. Also published were the addresses within each constituency where the provisional recommendations for each are available for inspection.

Representations about these recommendations may be lodged within one month of their publication and should be addressed to the secretary of the appropriate boundary commission, at St Catherines House, 10 Kingsway, London WC2B 6JP. Any representations received will be taken into consideration by the commission, before they formulate their final recommendations and submit them to the Home Secretary.

Aid for waste reclamation

At the end of April there had been 75 applications for assistance under the Department of Industry's £23 million scheme to encourage the paper and board industry to use more indigenous fibre, mainly waste paper.

Speaking at the thirtieth annual convention of the Bureau International de la Recuperation on Tuesday, Leslie Huckfield, Parliamentary Under-Secretary of State, added that 48 of these applications had been approved, involving assistance of £12.1 million towards capital costs of £52.6 million. Another 13 projects involving assistance of £3 million were still under consideration by the department. The scheme closes at the end of June this year.

The total increase in waste-paper processing capacity associated with the 48 approved projects was around 370 000 tonnes per year. As most of the projects were still under construction, Mr Huckfield explained that it would be some time before the full impact was felt on the waste-paper market, but it was hoped that the long-term effect would be to create a stronger continuing demand for this important waste product.

OVERSEAS

British-Soviet joint commission meets

Edmund Dell, Secretary of State for Trade, led the British delegation at the seventh meeting of the British-Soviet Joint Commission for Co-operation in Applied Science, Technology, Trade and Economic Relations, which opened in London on Tuesday (23 May) and closed on Thursday (25 May).

The Soviet delegation to the joint commission was led by academician Vladimir Kirillin, Deputy Premier and Chairman of the State Committee for Science and Technology.

The joint commission will review UK-Soviet economic, industrial, scientific and technological co-operation.

The sixth meeting of the joint commission was held in Moscow from 24 to 26 May 1977. The commission meets annually, alternately in London and Moscow.

EUROPE

Ministers talk on European aerospace collaboration

Eric Varley, Secretary of State for Industry, and Edmund Dell, Secretary of State for Trade, flew to Bonn and on to Paris on Tuesday (23 May) for talks on possible future aerospace collaboration with Europe.

In Bonn they met Martin Gruner, State Secretary at the Ministry for Economic Affairs, and later, in Paris, they continued the discussions with Mr J. Le Theule, the French Minister of Transport.

The purpose of the talks is to enable both Mr Varley and Mr Dell to inform themselves about the latest German and French proposals for new civil aircraft, and to exchange views on the prospects for collaboration.

In the past two weeks, Mr Varley and Mr Dell have held talks with three major United States aerospace manufacturers – Boeing, McDonnell Douglas and Lockheed – on possible civil collaborative projects.

Community economic strategy discussed

EEC ministers at the finance council held in Brussels on Monday (22 May) exchanged views on establishing a common economic policy strategy for the community, in the light of the conclusions reached by the European council in Copenhagen last April, and with a view to the meeting to be held in Bremen in July.

The ministers noted that within the community the outlook offered by the policies currently being followed was less encouraging than it should be if the employment situation was to improve, since in all the countries there were severe constraints which were restricting the scope of economic policy measures. The council agreed that a common strategy would enable these constraints to be alleviated. The council instructed its specialist bodies to continue their work so that at its next meeting in June the ministers of finance might be able to work out policy recommendations which could then be submitted to the European council.

Ministers examined the proposal for a decision empowering the commission to issue loans with a view to promoting investment within the community and evolved a common position on this matter. This was further to the decision of principle taken by the European council on 5 and 6 December 1977 on the creation, on an experimental basis, of a new loan instrument.

Proposal on VAT

The council was informed by the commission of the latter's intention of submitting to the council very shortly a proposal derogating from the sixth VAT directive as regards its date of application.

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Home news

Varley calls for co-ordination of design expertise and Industrial Strategy

Britain's design expertise must be co-ordinated with the Industrial Strategy if this country's industrial competitiveness is to be improved, said Secretary of State for Industry Eric Varley on 18 May.

Addressing the annual dinner of the Design Council in London, he stressed that Britain must produce the products that the consumer wanted at home and abroad, and design was one of the key factors that would determine their success in the market place. 'Good design is more than just a pleasing outer shell; it must go right through layer after layer of the product. The designer has a vital role to play from the first conception of the product which will satisfy a market requirement right through all the details of its development.'

If Britain's much envied expertise in design was to be used to its full, work in this area must be co-ordinated with work on the Industrial Strategy as a whole, Mr Varley said. Sector working parties, which were the main medium for work on the Industrial Strategy, had to be in the position to take full account of the technological advances and capabilities in their sectors. 'We must do all we can to ensure positive links and co-operation,' he added, between the sector working parties and bodies such as the Design Council and the requirement boards, which the Department of Industry had set up.

The government was determined to improve the country's industrial competitiveness. 'I think there is wide agreement that for Britain this means putting more resources into knowledge-intensive industries which manufacture products of higher added value; we must move up market and provide high quality goods of superior design and specification.'

See new appointments to Design Council, 'Official Appointments', page 413.

Huckfield urges buy British to improve living standards

It will be impossible for Britain to sustain its 3 per cent growth target in 1978 if the expansion of demand merely sucks in additional imports, said Les Huckfield, Parliamentary Under-Secretary of State for Industry, on 19 May.

Speaking at the Institute of Purchasing and Supply lunch, he urged his audience to buy British where goods of the right sort were available.

The more industry bought British, he said, and sold British, the more industry could make British and 'the more we shall be able to expand output and employment, improve living standards and get Britain moving'.

On imports, he said 'recent trends were far from encouraging'. In the last two years, despite the slow growth in domestic demand, imports of manufactured goods had increased by 20 per cent. Imports of motor vehicles shot up by 60 per cent, plastics by 54 per cent, and non-metallic mineral manufactures by 30 per cent. In some sectors, the problem had been long-term. Latest figures showed import penetration per annum as 84 per cent in office machinery, 53 per cent in radio and electronic components, and 45 per cent in sound-reproducing equipment.

'We need to get to grips with this problem now, before it puts the balance of payments in jeopardy and threatens the prospect of future growth.' Mr Huckfield stressed that the only long-term solution to rising imports was to improve the competitiveness of British industry right across the board, not just in terms of price, but in quality, design, reliability and delivery. 'This is what the Industrial Strategy is all about.

'The Industrial Strategy can help in reducing import penetration in the medium term, but we can all make an immediate contribution in this direction by buying British goods whenever possible.' He instanced government departments which obtained only about 5 per cent of their requirements, excluding raw materials and goods associated with international defence projects, from overseas, and the nationalised industries which imported only 3½ per cent of their supplies.

Mr Huckfield explained that it was in the business sector that a real impression could be made on the problem. As customers, companies accounted for much the greater part of the £17 billion of capital goods and intermediate manufactures imported into this country last year. As retailers and distributors, they handled most of the £5 billion of manufactured consumer goods the UK imported. 'These are huge figures and even a relatively small reduction in them would have a real impact on industry and the balance of payments,' he added.

New assembly technique for BL Cars

With six-cylinder Princess 2200 models, BL Cars' design and production engineers have successfully pioneered the world's first application of the SPS joint control system to automotive cylinder heads. The system, which is shown here at work on the Princess 2200 assembly line at Longbridge, is being phased in on other BL Cars engines.

Standards crucial for Industrial Strategy – Hattersley

The list of the areas in which standards are influential demonstrates their crucial importance to the Industrial Strategy, said Secretary of State for Prices and Consumer Protection Roy Hattersley on 17 May.

Opening a one-day London conference on the role of standards in the Industrial Strategy, he explained that the central theme of the Warner report 'undoubtedly' commanded general support. Good standards encouraged the application of sound and improved technology. By eliminating unnecessary diversity, they reduced manufacturing costs and generally increased productivity. They could help to make the best use of Britain's energy and to conserve scarce resources. And they could enable British industry to improve its penetration of overseas markets.

He pointed out that the development of new standards was not an area that was noted for speed. First, there was a balance to be drawn between the benefits of a reduction in variety and the detriments of regimentation. Secondly, there was the difficulty of adopting the correct standard – one man's standard was another man's barrier to market entry.

But, he said, the work of which the conference formed a part (the avoidance of proliferation) had been characterised by the speed and enthusiasm with which difficult subjects had been tackled. He referred to the 'remarkably short space of time' in which Sir Frederick Warner had managed to complete his report. The firm basis which the report provided had been demonstrated by the prompt responses of the sector working parties and of government, which had already been presented to the National Economic Development Council.

Government and industry had accepted their respective roles in encouraging the best use of standards, Mr Hattersley said. On the industry side, suppliers and users in both the

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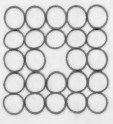

Contact: Sir John Trelawny, Bt.

Plumbley/Endicott & Associates Limited,

Management Selection Consultants,
Premier House, 150 Southampton Row,
London WC1B 5AL. Tel. 01-278 3117

private and public sectors needed to put their full weight behind the use of standards in order to reduce the proliferation of user specifications. The government interest was not only as a partner in the Industrial Strategy but also as a major purchaser and a legislator.

'My colleagues in major purchasing departments are giving high priority to ensuring that their requirements are related to standards, and their commitment to this approach was emphasised at the NEDC meeting last March by the reaffirmation of the principles of the white paper on public purchasing and industrial efficiency.'

Local authorities and the nationalised industries had also been asked to promote the objectives advocated by Sir Frederick Warner. The public sector standardisation team, for which the Department of Prices and Consumer Protection was responsible, was particularly concerned with promoting the use of common purchasing specifications for common user items, as far as possible aligned with British standards. 'The team bears in mind at all times the needs and constraints of export markets.'

Mr Hattersley explained that in its role as legislator, government was involved both in consumer protection and industrial safety and health. The Consumer Safety Bill, a private members' bill currently before the house which had government support, included powers that would enable him to include 'deemed to satisfy' references to specified published standards in safety regulations. And in the health and safety at work area, the 1974 act already permitted the use of standards on a 'deemed to satisfy' basis.

Referring to work in international bodies, he said that under article 100 of the treaty of Rome the programme for the harmonisation of disparate national regulations was committed, wherever possible, to make references to harmonisation of standards, especially those prepared by the European standards bodies, CEN and Cenelec. The government was anxious to do what it could to help these bodies and their wider counterparts to make quicker progress in the development of widely accepted international standards. 'We are also concerned with the current Gatt discussions, which include, importantly, a proposed draft code of conduct aimed at encouraging the use by governments of international standards when preparing technical regulations.'

Mr Hattersley said that although the government considered it wrong to extend compulsory prohibition of the use of imperial units at retail level, it was still firmly committed to metrication and was conscious of the particular importance attached to this by those concerned with exports. 'We shall continue to support the orderly progress to the use of metric units with target dates for the termination of imperial quantities.'

Later in the year Mr Hattersley said he would be reporting to NEDC on other matters in the Warner report and he expected shortly to be initiating a wider public discussion on the question of quality assurance.

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Proprietary medicines: commission finds high profit margins

In its report on proprietary medicines, published on 18 May, the Price Commission found that some over-the-counter medicines were producing very high profits for the companies producing them and that, in a number of cases, the costs of advertising and marketing exceeded production costs.

Concentrating its examination on 26 major companies, the commission found five leading and long-established products making a contribution to overheads and profits well above the average for the industry as a whole. These were Anadin (The International Chemical Company Ltd), Disprin (Reckitt and Colman Products Ltd), Milk of Magnesia (Sterling Health Products), Rennies (Nicholas Laboratories Ltd), and Beechams Powders (Beecham Products (UK)). Its special survey of eye preparations showed that eye lotions made by Optrex – the leading manufacturer here – cost the consumer five times the cost of making them.

The commission points out that people seldom choose medicines on the basis of price and brand loyalty is high. There is little price competition between the various manufacturers and its place is taken by competitive advertising of rival products – some of it very heavy. For this reason, the commission looked closely at the profit margins of individual products and their contributions to company costs and overheads.

In the case of Optrex, the commission said that it appreciated that the company wanted to build up its exports and expand its range of products, but it did not think the users of Optrex eye lotion should be called upon to finance this to such a large degree. It recommended that there should be no further increase in the price of Optrex eye lotion before March next year.

Referring to the other five named products – Anadin, Disprin, Milk of Magnesia, Rennies and Beechams Powders – the commission says it accepts the need for such successful medicines to help in the research and development of new ones, but the very high profit margins could only be justified in exceptional circumstances. It will scrutinise any future price increases notified to it for these products and might then consider holding one of its three-month investigations into the companies concerned.

On advertising and promotion in general, the report says the industry needs to provide a great amount of information about its products so that people can know how to select and use them. It argues that there is a similar need for much more information and help for the consumer over the non-branded medicines – like ordinary aspirin and paracetamol – which are available over the counter in every chemist's shop – very often at a considerably lower price than similar branded products, though not always of identical quality.

Price Commission Sectoral Examinations Report no. 4, 'Prices, Costs and Margins in the Production and Distribution of Proprietary Non-ethical Medicines', is available from HMSO (HC469 ISBN 0 10 246978 4), price £1.35. The report is being considered by Secretary of State for Prices and Consumer Protection Roy Hattersley, who will be consulting interested parties about the findings.

Solicitors' advertising rules relaxed

Rules governing advertising by solicitors are to be relaxed, said John Fraser, Minister of State for Prices and Consumer Protection, on 17 May.

In a parliamentary answer he explained that the proposed relaxation would allow law societies in England and Wales to publish information in local newspapers about individual firms of solicitors.

New entrants and solicitors opening new or branch offices will also be allowed to make appropriate announcements and the Law Society will be considering how to improve further the degree of information given about solicitors available to take legal aid cases.

The Law Society of Scotland has issued a comprehensive national directory of solicitors giving detailed information about the practices of virtually all solicitors operating in Scotland. Concessions of a similar nature to those of solicitors in England will apply to new entrants and to those opening offices or branch offices in remote or deprived areas.

The relaxation of the rules resulted from discussions between the two law societies and the Office of Fair Trading, following two reports from the Monopolies and Mergers Commission, published in July 1976. Welcoming the move on behalf of Secretary of State for Prices and Consumer Protection, Roy Hattersley, and himself, Mr Fraser said that they nevertheless regretted that the proposals did not fully meet the MMC's recommendation that individual solicitors should have the discretion to advertise as they thought fit subject to certain safeguards. They therefore expected the Law Society and the Law Society of Scotland to consider the matter further in the light of any relevant findings or recommendations of the two royal commissions on legal services and of experience gained from the new arrangements.

None of the order-making powers conferred on the Secretary of State for Prices and Consumer Protection by section 56 and schedule 8 of the Fair Trading Act 1973 enable him to enforce full implementation of the MMC's recommendations. The Solicitors' Act 1974 and the Legal Aid and Solicitors (Scotland) Act 1949 empower the Law Society and the Law Society of Scotland to make rules as to the professions' practice, conduct and discipline, subject only to the approval of the Master of the Rolls and the Lord President of the Court of Session respectively.

The two Monopolies and Mergers Commission reports – 'Report on The Supply of Services of Solicitors in England and Wales in Relation to Restrictions on Advertising' (HC 557 ISBN 0 10 255776 4) and 'Report on the Supply of Services of Solicitors in Scotland in Relation to Restrictions on Advertising' (HC 558 ISBN 0 10 255876 0) – are available from HMSO, priced £1.50 and £1.15 respectively.

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TI 26/5

Stop pressure in insurance selling – Clinton Davis

People should be advised – even urged – to buy the insurance cover they need, but they must not be pressurised into buying the wrong cover, too much cover, or more cover than they can afford, said Stanley Clinton Davis, Parliamentary Under-Secretary of State for Companies, Aviation and Shipping, on 19 May.

In a speech to the Corporation of Mortgage, Finance and Life Assurance Brokers in London, he said that the process of selling insurance had to be conducted properly. When insurance was sold by the insurance companies and their agents, the companies had to carry the responsibility for their selling methods. The government was working on proposals to make the companies' responsibilities here clearer and more direct.

He pointed out, however, that much insurance was sold, not by the insurance companies or their agents, but through brokers, who had – 'or should have' – independence from particular insurers.

The Department of Trade published a consultative document on insurance intermediaries in 1977 and Mr Clinton Davis referred to the fact that it highlighted the lack of clear distinction between, on the one hand, the insurance intermediary acting as an agent representing one or perhaps more companies and, on the other, the broker holding himself out as offering disinterested advice. 'We were uneasy, to say the least, about the way anyone could set up a business as a broker, regardless of his knowledge and experience in insurance, his character and ethical standards, or his financial resources or arrangements for handling clients' money.'

Following publication of the consultative document, the Insurance Brokers (Registration) Act was passed through parliament – a measure based on proposals drawn up by members of the insurance broking industry and backed by the government. Since the establishment of the Insurance Brokers Registration Council last December, its members had been drawing up rules under the act for government approval with a view to opening a register of brokers later this year.

Mr Clinton Davis explained that preparation of all these rules under the act required a great deal of work. But it was essential that there was no undue delay in bringing them into force – 'and they must be in force before the new register can be opened'.

Having enacted the legislation, parliament would expect to see it fully implemented with all speed, he said. 'I hope therefore that the council will soon be in a position to seek the views of those concerned on their detailed proposals and then – I hope by the autumn – submit them to us for approval.'

Minister opens Scottish–Japanese joint venture

Minister of State at the Scottish Office, Gregor MacKenzie, welcomed prospective Japanese investment in Scotland when he officially opened the new Wishaw factory of Daiwa Sports on 15 May.

He pointed out that this was the first substantial manufacturing operation by a major Japanese interest to be set up in Scotland. 'I hope its success will encourage other Japanese companies to consider Scotland as a location. It is a very good springboard into the EEC market, and we have a great deal to offer potential investors.'

Gregor MacKenzie (right) examines a fishing rod with Mr A. E. McCunn, chief executive of Daiwa Sports, after opening the company's new factory at Wishaw, Scotland.

Daiwa Sports is owned by a 50/50 partnership of Glasgow-based Grampian Holdings Ltd and the Daiwa Seiko Group of Tokyo, which claims to be the world's largest manufacturer of fishing tackle. The company occupied the 25 000 sq ft factory last July, and currently employs 90. Production of fishing rods at the factory is aimed at the UK and European markets previously supplied from the Far East. Plans are already in hand to extend the plant to meet increasing demand.

Scotland's first mobile CAB

Scotland now has its first mobile citizens' advice bureau. The bureau, operated by Glasgow's Radio Clyde, was opened by Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, on 18 May.

He said that the launching of this bureau was a commendable extension of the role which the radio station already played in offering advice and information to its many listeners. 'I am glad that Radio Clyde should, with the Scottish Association of Citizens' Advice Bureaux, provide for an obvious social need. I wish them the success they deserve, and hope that others will come to learn from, and act on, their example.'

SDA looks to a future in electronics

To assess how Scotland can best benefit from what it describes as the world's fastest-growing business, the Scottish Development Agency has commissioned a major study of the electronics industry.

The study will take eight months to complete and will be the first detailed analysis of Scotland's present and future roles in electronics, which the agency considers a priority area of investment. Management consultancy Booz, Allen and Hamilton has been appointed to prepare the report and advise on the agency's future strategy.

SDA chairman Sir William Gray said the study would establish a basis for taking initiatives to assist companies established in Scotland, to set up new enterprises or joint ventures and to attract new investment from overseas.

Director of strategic planning Edward Cunningham pointed out that most electronics businesses established in Scotland were manufacturing operations, but there were indications that multinational companies would consider setting up research, development and marketing facilities there. He explained that electronics production had begun to move from low-cost areas, such as Singapore and Taiwan, closer to European markets. 'This trend is expected to continue as labour costs become less important than having research and development close to manufacturing points.'

Local firms occupy factories at Grimsby . . .

An advance factory of 450 m² built by the English Industrial Estates Corporation (EIEC) on the Department of Industry's South Humberside industrial estate, Grimsby, has been occupied by Metropes Engineering.

The firm, which designs and manufactures special-purpose machinery, has been occupying small premises and requires larger premises for expansion. It expects to create additional employment for 14 people within two years.

. . . Birkenhead . . .

Gandy Belting will occupy premises of about 4000 m² administered by EIEC for the department in Corporation Road, Birkenhead, in the Merseyside special development area.

Part of the Allied Polymer Group, Gandy Belting will use the premises for the manufacture of light and medium-duty conveyor belting. The company expects to employ 29 people at Birkenhead and the additional production space made available will create another 60 jobs at the company's Wheatland Works at Wallasey.

. . . and Burnley

Brencliffe is occupying an advance factory of 1350 m² built by EIEC for the department at Rossendale Road, Burnley.

The firm currently occupies premises at Westgate, Burnley, for the manufacture of circular knitted stockinette material mainly for polishing cloths but requires larger premises to expand production and increase the range of manufacture. Apart from the 26 transferees, the company expects to employ an additional 26 people in the new factory, as production builds up over the next two years.

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Work starts on factory at Cark

Work is about to start on the construction of an advance factory of about 360 m² for the Development Commission on the Department of Industry's new site at Cark-in-Cartmel, Cumbria. The factory is capable of division into two smaller units of about 180 m² each.

A contract worth about £83,000, which includes site development works, has been awarded to W. G. Royles and Son Ltd of Kirkham. The premises should be ready for occupation by November.

Advance factories 'milestone' in Wales

Letting of 12 more advance factories, which will eventually employ 600 people, has been approved by the Secretary of State for Wales, John Morris. Answering a parliamentary question on 15 May, Mr Morris said that so far this year 53 advance factories had been formally or provisionally allocated, covering over 500 000 sq ft to provide an estimated 2 740 jobs.

Eight of the factories – at Gaerwen, Pontardawe, Milford Haven, Fishguard, Leckwith, Bridgend, Pengam, and Tafarnaubach – are on Welsh Development Agency sites, while the other four – at Blaenau Ffestiniog, Abercrave, Llandrindod Wells and Hay-on-Wye – are on Development Board for Rural Wales sites.

Mr Morris described the announcement of 12 factory lettings on one day as 'a milestone'. The government's belief had been that a supply of 'off-the-shelf' factories backed up by the efforts of the WDA, the DBRW and the Welsh Office 'would allow us to make the best of any upturn in the economy. It is heartening to see that the factories concerned are in many parts of Wales – some in rural areas, some in urban areas.

'It is also encouraging that we have been able to help existing industries expand, new industries come into being as well as attract companies into Wales – exactly the purposes for which we have an advance factory programme and why we set up the WDA and the DBRW. I look forward to being able to announce even more factory lettings very soon.'

DOE approves new schemes for docklands

Approval has been given by the Department of the Environment for schemes to be undertaken in the Dockland Partnership area for 1978-9 under the expanded urban aid programme. The schemes total nearly £3¾ million, from which a final programme costing £3¼ million will be selected by the Docklands Joint Committee.

The projects range from recreational/open-space facilities, to community and social facilities, environmental improvements to education and the provision of infrastructure, including roads and preparatory work for an advance factory site. They were agreed at a meeting of the Docklands Joint Committee in April and approved in principle by Peter Shore, Secretary of State for the Environment and chairman of the Docklands Partnership.

Projects were submitted by the partnership authorities – the Greater London Council, Greenwich, Lewisham, Newham, Southwark and Tower Hamlets Councils and the Inner London Education Authority – and by voluntary organisations. Over £413,000 has been allocated to schemes originating from voluntary organisations. In deciding upon a final programme, the Docklands Joint Committee will have to take into account holiday projects previously approved for Easter and for the summer, amounting to over £40,000.

In consultation with voluntary associations, work has already started on preparation of the inner area programme for 1979-82 for which the docklands area has been allocated £15 million a year. This programme will enable the speeding up of the work on implementing the docklands strategic plan agreed in 1976.

Two advantages of North Sea oil – Dell

North Sea oil gives the UK two advantages – security of supply and a greater opportunity for economic stability compared with other developed countries, Edmund Dell, Secretary of State for Trade, said on 15 May.

But, he told the *Financial Times'* conference on North Sea oil and its economic impact, it was not a bonanza, not a panacea, not a recipe 'for any rate of economic growth that we could not achieve by our own efforts even in the absence of North Sea oil'.

It was not even a guarantee that the UK would be exempted from the pressures and pains which other nations might be subjected to in this difficult economically depressed world.

Mr Dell said that it was an opportunity to regulate Britain's affairs freer from, though not free of, some of the anxieties that would beset the UK's neighbours.

Mr Dell outlined the benefits of North Sea oil to the UK. The first he said was security of supply.

The trouble with security was, he continued, that, valuable as it was, it was not available in the form of a bonanza. It could not be turned into cash and distributed to old age pensioners, whether people or industries, and the security benefits of North Sea oil were of this kind. They were considerable, but not cashable and hence not a bonanza.

On the suggestion that a substantial part of government revenue, whether available from North Sea oil or elsewhere, should be used to develop replacement energy resources, Mr Dell said that it would not make sense to develop these sources at a cost totally unrelated to the cost of oil after the North Sea runs dry. But some price would be worth paying. If the shortage of energy for a long period after the 1990s was likely to be extremely acute, then development of alternative energy resources would be justifiable, even at a very high cost.

But in making these decisions and estimating the acceptable additional cost Britain should at least realise that the future supply of oil was a matter of uncertainty and that estimates had changed very rapidly.

Discussing the 'resource' benefits of North Sea oil, Mr Dell said that there were three ways in which it could be particularly beneficial and could directly help the process of industrial recovery.

First, it should be easier than it had been since 1973 to conduct economic policy in a way which would lead to a marked strengthening of Britain's balance of payments over the North Sea oil period, compared with what otherwise would have been the position.

Secondly, said Mr Dell, there would be a substantial increase in the government's revenue. This meant that the government's room for manoeuvre was greater than it otherwise would be.

Thirdly, Mr Dell said there was the historic significance of North Sea oil for the British people.

He said 'If economic management permits, the security it provides in balance of payments terms can stimulate acceptance of a much more systematic long-term approach to our economic problems. It can provide a more stable and predictable framework for industrial progress.'

Electricity: most valuable market for coal – Eadie

Britain will need a strong, competitive, and vigorous electricity industry for the years ahead, said Parliamentary Under-Secretary of State for Energy Alex Eadie on 17 May. During a visit to Rugeley and Drakelow power stations in Staffordshire, he said, the industry occupied a central place in Britain's energy economy, and was likely to become even more important in the years ahead.

He pointed out that electricity's markets had suffered over the last few years as a result both of general economic recession and of the surge in fossil fuel prices. But electricity had become a crucial outlet for Britain's wealth of coal. In 1977 the industry took about 65 per cent of total coal production. Power stations were likely to remain the main users of coal, at least for the rest of this century, he said. Since 1973, UK power station coal burned had increased from 66 million tons a year to 78 million tons, and the CEGB would have the capacity to burn 85-90 million tons a year by 1990.

Mr Eadie drew attention to a number of interesting developments on the horizon for coal-fired electricity generation. The government was considering, for example, the CEGB's proposals for a cross-Channel electricity link with a capacity of 2000MW. The proposals offered an opportunity for Britain to export up to a million tons of coal 'by wire' each year to France.

As well as being coal's most valuable market, he explained that electricity would also be the vehicle for any growth in Britain's nuclear capacity. 'It seems clear that there will be a role for both coal and nuclear power in electricity generation for the years ahead.' And,

further in the future, electricity was likely to be the obvious way of using a number of the renewable sources of energy, such as wind and wave power, he added.

Over £20 million claimed in fuel aid – Cunningham

Provisional figures show that some 600 000 electricity consumers have claimed the discount on electricity board bills over £20, and over three million people receiving supplementary benefit or family income supplement received a £5 cash payment last January towards their electricity or other fuel bills. These figures were given by John Cunningham, Parliamentary Under-Secretary of State for Energy, in answer to parliamentary questions on 17 May.

The £5 cash payment scheme totalled just over £16 million and claims on the discount scheme totalled £4.5 million, he said. Dr Cunningham pointed out that eligible consumers could still get discount vouchers from post offices up to 30 June, in addition to the £5 payment received in January.

New offshore drive by British Shipbuilders

In a drive to seek North Sea and other offshore business, British Shipbuilders has appointed Jolyon Sloggett, formerly deputy chairman of Houlder Offshore, part of the Houlder Bros shipping organisation, as managing director of marketing and product development. His task is to concentrate the offshore 'know-how' within the state-owned organisation.

Mr Sloggett explained that there was already a great deal of expertise within British Shipbuilders on projects like module building, drilling ships and submersibles, but pointed out that the knowledge was dispersed amongst various parts of the organisation. 'My task is to bring this together and to create a common design and production unit within British Shipbuilders which can offer a complete service to those engaged in the very difficult business of seeking oil, gas and other minerals under the seabed.'

He added that British Shipbuilders' efforts would not be confined to the North Sea nor solely to home waters. 'There is vast scope opening up in offshore work in many parts of the world and much of the pioneering in this field has been carried out in Britain.'

The packaging code

Members of the Packaging Council which was launched last week (*Trade and Industry*, 19 May, page 340) are:

Chairman: Lord Shepherd, former Lord Privy Seal, leader of the House of Lords; deputy chairman, Sterling Group and presently chairman of Civil Service Pay Research Unit Board, and British Medical Research Council.

Director: Maurice Paynter, former chief executive of the Institute of Packaging.

Members: Mrs Janet Graham, member of the executive of the National Federation of Consumer Groups; Miss Jennifer Tanburn, director of research and consumer affairs, food and distribution division, Booker McConnell Ltd; Tom Burke, managing director, Friends of the Earth; David Lewis, director-general, Keep Britain Tidy Group; Derek Huffam, vice-chairman, Metal Box Company; Colin Paterson, managing director, British Home Stores; Robert Wadsworth, director, Cadbury Schweppes Ltd; Victor Watson, chairman, Waddingtons; John Thirlwell, member of the council of the Consumers Association; Mrs Joan Young, member of the National Consumer Council.

Co-opted members: Frank Paine, director, Packaging Division, Pira and Ronald Watkins, chief executive, the Institute of Packaging.

Three members have still to be appointed, two industry representatives and one trades union representative.

The council will administer a code for the packaging of consumer goods. Introducing the code, Lord Shepherd, described it as 'a good starting point. It will be revised and strengthened in the light of experience and following consultations'. The council's power and duty, Lord Shepherd said, should be an adequate sanction against those who fail to follow the spirit and terms of the code.

The code states that the prime function of packaging is to enable consumers to receive products in good condition at the lowest reasonable price. Any manufacturer, distributor or retailer concerned with design or use of packaging has a responsibility to ensure that there is a regular review of packaging having regard to the economics of the total manufacturing/distribution chain and to considerations of re-use, and disposal. Marketing and commercial considerations should be reconciled as far as possible with economy in the use of materials and energy, and the environment.

- ☐ Packaging must comply with all legal requirements.
- ☐ In containing a product the package must be designed to use materials as economically as practicable while at the same time having due regard to protection, preservation and the presentation of the product.
- ☐ Packaging must adequately protect the contents under the normal foreseeable conditions of distribution and retailing and also in the home.
- ☐ The package must be constructed of materials which have no adverse effects on the contents.
- ☐ The package must not contain any unnecessary void volume, nor mislead as to the amount, character or nature of the product it contains.
- ☐ The package should be convenient for the consumer to handle and use. Opening (and reclosure where required) should either be obvious or indicated and convenient and appropriate for the particular product and its use.
- ☐ All relevant information about the product should be presented concisely and clearly on the package.
- ☐ The package should be designed with due regard to its possible effect on the environment, its ultimate disposal, and to possible recycling and re-use where appropriate.

It is natural, Lord Shepherd said, that the council would have its attention drawn to particular complaints. When they were received they would be dealt with, but it was right to mention that consumers already had formidable protection, through legislation, both from the retailer and the manufacturer of the product. This was covered in the code's first point. Lord Shepherd drew attention to the many bodies throughout the country with intimate experience and knowledge who were ready to advise or act where necessary, for example consumer advice centres and citizens' advice bureaux. 'I hope these bodies will continue to be used and we shall be in close touch with them. The council should not be seen as a replacement of these national and local bodies who have rendered great service to the community, but we shall be there to examine and assist when problems arise.'

Official appointments

Design Council. Secretary of State for Industry, Eric Varley, has appointed eight new members to the Design Council. The new appointments, which bring the total membership to 32, including the chairman, Viscount Caldecote, are as follows:

Professor B. Wilson, professor of organisation and human resources, Cranfield School of Management; Mr W. M. Windsor, joint managing director, engineering group, Vickers Ltd; Miss D. O'Cathain, chief group planning executive, Unigate Ltd; Mr F. Jarvis, general secretary, National Union of Teachers; Sir Paul Reilly, former director of the Design Council; Mr P. Boon, chairman, Hoover Ltd; Mr H. J. H. Wassell, engineering director, GEC-Marconi Electronics Ltd; and Dr P. A. Allaway, chairman, EMI Electronics Ltd.

Civil Aviation Authority. Edmund Dell, Secretary of State for Trade, has appointed Michael Vivian as deputy chairman of the Civil Aviation Authority for a period of two years. Mr Vivian is already a full time member of the board of the authority and until his appointment as deputy chairman held the position of group director, safety services.

Gas Consumers' Council. Roy Hattersley, Secretary of State for Prices and Consumer Protection, has appointed Mr G. E. Peacock and Mr S. H. Hibberts as members of the Northern Gas Consumers' Council until 31 March 1981, and Mrs F. Gatenby and Mr J. Parton as members of the North Eastern Gas Consumers' Council until 28 February 1981.

North Eastern Electricity Board. Tony Benn, Secretary of State for Energy, has appointed Bryan William Atkinson as a part-time member of the North Eastern Electricity Board for three years from 1 June 1978.

No more general fare increases this year – BR

There will be no further general increase in rail passenger fares in 1978, said British Rail on 11 May. The announcement was made after the railways board had met to discuss an analysis of the results of the passenger business in the first 12 weeks of the year.

When fares were raised in January 1978, the board told the Price Commission that it hoped to hold fares at the new level until the autumn, and if possible for the full year. BR chairman, Peter Parker pointed out that the recovery in passenger volume had continued in 1978 and business was up 3 per cent on 1977. 'We believe that this improvement will continue and that we will be able to meet our contract with government without having to increase our passenger fares in the autumn'.

Heathrow-Gatwick helicopter link

British Caledonian Airways and British Airways Helicopters have been granted an air transport licence by the Civil Aviation Authority to operate a scheduled helicopter service between Heathrow and Gatwick airports for 18 months on a trial basis.

The licence is subject to a number of conditions: the number of daily flights is limited to 10 in each direction (unlimited frequency had been applied for); no flight to depart before 0645 hrs, with the last flight of the day departing before 2200 hrs; cargo may be carried only in the forward hold, the aircraft must always be operated in its passenger configuration, and no flight (other than a positioning flight) shall be operated solely for the carriage of cargo; the licence shall be valid from 9 June 1978 to 8 December 1979 (9 June 1978 to 8 June 1980 had been applied for).

The CAA decision follows a public hearing held on 5, 7 and 9 April.

Expresspost launched from eight new centres

Expresspost, the Post Office's high-speed mail service designed to get urgent letters and packets delivered the day they are posted, was extended to eight new centres on 15 May. The service, which was already operating locally and between London, Birmingham, Manchester, Liverpool, Leeds and Medway, is now available in Bath, Bristol, Cardiff, Swansea, Oxford, Cambridge, Edinburgh and Glasgow.

Each centre will operate a local delivery service as well as links to and from London. Inter-city services will operate between any of the 14 Expresspost centres where direct rail links are available. Information on these services will be available by asking the telephone operator for Freefone 2333.

While the local service aim is a two-hour delivery, the Post Office says that in practice this is often completed in around 40 minutes in some of the established centres. It points out that actual delivery time is dependent on the availability of messengers and the distance involved. Minimum charge of local Expresspost service is £1, although the average is around £1.50. Discounts are available when there is more than one package for delivery in the same district and for regular, prescheduled consignments.

Telephone numbers for Expresspost in the new centres are: Bath (0225) 62440; Bristol (0272) 27050; Cardiff (0222) 31313; Swansea (0792) 462828; Oxford (0865) 47474; Cambridge (0223) 68844; Edinburgh 031-556 1777, Glasgow 041-226 4444.

Impact of increase in money earnings compared

Recent trends in earnings and unit labour costs in the UK and competitor countries provide the theme for the leading article in the May issue of the Treasury's *Economic Progress Report*. They show that the rate of increase in UK wage costs per unit of output is currently higher than that of any other major industrial country, with the exception of Italy.

The article compares growth rates of earnings, productivity, unit wage costs and consumer prices for the UK and other major industrial countries over two periods, 1965-73 and 1973-77. The comparisons show that, despite the various other factors affecting prices (profits, import costs and indirect taxes), there is a relatively close parallel be-

WEMBLEY AUCTION SALES 1978

6 June 1978

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Description of Goods:	Miscellaneous office equipment and furniture etc. (Potential buyers are advised to refer to the official catalogue available from the auctioneers, price 20p.)
Auctioneers:	Messrs Hollingsworth Westcombe House 56/58 Whitcomb Street Leicester Square London WC2H 7DR Tel. 01-893 1875

Potential buyers are advised to refer to the official catalogue available direct from the auctioneers price 10p

Government sales

6–7 June 1978 — Miscellaneous

Location:
Ordnance Storage and Disposal Depot, Ruddington nr Nottingham
Auctioneer:
Arnold and Son (Dept L), 13 Market Place, Burton-on-Trent, Staffs (0283 64657)
Stores lying at Donnington, Stafford, Ruddington and other depots comprising aircraft spares, furniture, Rolls Royce petrol engines, street lighting equipment, MT spares, surveying equipment, compressors, vehicles and other items.

13, 14 and 15 June 1978 — Vehicles

Location:
Ordnance Storage and Disposal Depot, Ruddington nr Nottingham
Auctioneer:
Walker Walton and Hanson (Dept L), Byard Lane, Bridlesmith Gate, Nottingham (0602 54272)
Over 1400 lots including Morris 1000 saloons and Travellers, Austin 1800s, Ford Escort and Granada Estates, Landrovers, Bedford and BMC minibuses, Bedford trucks, Austin 1 ton signals vans. Road and factory trailers, Bedford coaches. Cranes by Jones, Coles and Iron Fairey. Fork lift trucks by Hyster and Coventry Climax. Massey Ferguson tractors and many other items.

Catalogues, which give details of the lots, conditions of sale, viewing times etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 40p, postage 15p (postal orders only).

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despair?

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-COUNTRYWIDE-

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tween rates of unit wage cost growth and of consumer price inflation. If earnings and therefore the cost of labour rise faster than productivity, unit labour costs will rise and this will push up prices.

Even in 1973-77, with large movements in exchange rates and substantial divergence of productivity from its trend, the countries with the most rapid growth of unit wage costs – Italy and the UK – experienced the highest rates of inflation, while slow unit wage cost increases in West Germany and the United States were associated with relatively low inflation rates.

In 1976-77, the article says, the UK was more successful in reducing the rate of earnings increase, and thus unit wage costs. The result has been a marked deceleration in the rate of inflation: in March the year-on-year rate was 9.1 per cent, the lowest annual increase since August 1973. But although the current UK rate is now somewhat below the OECD average, it still remains higher than that of certain major competitors, notably West Germany, Japan and the United States, and recently the UK has done less well in terms of the rate of increase of earnings and unit wage costs.

In all the major industrial nations except the UK the growth of trend unit wage costs in manufacturing fell between 1976-77 and the latest 12 months for which data are available. The result is that the UK's rate of increase of unit wage costs in manufacturing is again the highest except for Italy's. The most recent evidence suggests, therefore, that the underlying pressure of domestic costs has become stronger and remains greater in the UK than in the most important competitor countries, holding the danger of a reversal of the recent downward trend in inflation, with its likely adverse effects on activity, employment and living standards.

Merger proposal cleared

Secretary of State for Prices and Consumer Protection Roy Hattersley has decided, on the information at present before him, not to refer the merger between Beneficial Corporation and Security Trust Company to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Views required on proposed Lonrho merger

The proposed acquisition by Lonrho of Scottish and Universal Investments, and the consequent merger situation involving Lonrho and House of Fraser were referred to the Monopolies and Mergers Commission on 12 May by Secretary of State for Prices and Consumer Protection Roy Hattersley (see *Trade and Industry*, 19 May, page 342). The commission is required to report within six months.

Any person or organisation wishing to give views or information should write as soon as possible to The Secretary, Monopolies and Mergers Commission, New Court, 48 Carey Street, London WC2A 2JT.

Inventions involving microorganisms: deposit of samples

Under rule 17 of the Patents Rules 1978, concerning an invention which requires for its performance the use of a microorganism which is not available to the public, a culture of the microorganism must be deposited in a culture collection not later than the date of filing the application. On and after the date of publication of the application samples must be made available to any person subject to certain conditions being fulfilled.

It is the responsibility of the applicant to select the culture collection with which he makes such deposit and to ensure that deposit has been made and that samples of the culture will be available in accordance with this rule.

The culture collections named below are understood to be prepared to accept deposits of cultures of microorganisms of the kinds indicated and to release samples in connection with UK patents and applications made for UK patents. But it is strongly advised that potential depositors satisfy themselves on these matters before seeking to make deposit.

National Collection of Type Cultures, Central Public Health Laboratory, Colindale Avenue, London NW9 5HT	Bacteria of medical and veterinary importance
National Collection of Dairy Organisms, National Institute for Research in Dairying, Shinfield, Reading, Berkshire RG2 9A2	Bacteria from milk and milk products
The Culture Centre of Algae and Protozoa, 36 Storey's Way, Cambridge CB3 0DT	Algae and protozoa
Commonwealth Mycological Institute, Ferry Lane, Kew, Surrey	Fungi (other than animal pathogens and wood-rotting fungi)
National Collection of Yeast Cultures, Brewing Industry Research Foundation, Lyttel Hall, Nutfield, nr Redhill, Surrey RH1 4HY	Yeasts (other than pathogens)
Torrey Research Station, PO Box 31, 135 Abbey Roads, Aberdeen AB9 8DG	Most non-pathogenic bacteria and actinomyces
ATCC (American Type Culture Collection), 12301 Parklawn Drive, Rockville, Maryland 20852, USA	Most microorganisms including viruses

BAe announces first financial results

Sales turnover of British Aerospace for 1977 increased by 16 per cent over the previous year. In its first annual report and accounts for the year ended 31 December, 1977, the corporation reports a sales turnover of £859,645,000 compared with £740,338,000 in 1976.

The forward order book was £2.3 billion at the end of the year compared with £1.5 billion at the end of 1976. Of the sales turnover, some £536 million or 62 per cent was in respect of exports of aircraft and weapons. Total sales produced trading profits of £65,141,000 in 1977 – from £55,522,000 in 1976.

The accounts cover the full 12-month period of 1977 and include the period up to vesting day, 29 April, 1977, when the shares were transferred from the former operating companies, British Aircraft Corporation (Holdings) Ltd, Hawker Siddeley Aviation Ltd, Hawker Siddeley Dynamics Ltd and Scottish Aviation Ltd.

In his report, the chairman, Lord Beswick, stresses the significance of the corporation as a new force in aerospace, being the largest in the western world outside the United States with a spread of skills and products unsurpassed by any other single organisation. He pays tribute to his colleagues for their resources and devotion in achieving an integrated organisation within eight months.

Elliott Group inspectors appointed

Secretary of State for Trade Edmund Dell has appointed Brian Michael Hooper and William James Henry White, both of Gavrelle House, 2-14 Bunhill Row, London EC1, under section 32 of the Companies Act 1967 as inspectors to investigate and report on dealings in the shares of the Elliott Group of Peterborough since January 1977, to determine whether contraventions of section 27 of the Companies Act 1967, as amended, have occurred.

Patents endorsed 'licences of right'

Under section 35 of the Patents Act 1949 the following patents were endorsed 'licences of right' on the date specified:

8 May 1978

1433930 Standard Telephones and Cables Ltd
Method of encapsulating liquids

1434308 Standard Telephones and Cables Ltd
Improvements in or relating to semiconductor devices

1440381 Standard Telephones and Cables Ltd
Improvements in or relating to telephone subscribers intruments

1446024 Standard Telephones and Cables Ltd
Improvements in or relating to telephone subscribers instrument

1147800 AAI Corporation
Variable delay combustible fuse and propellant charge device

1260105 AAI Corporation
Projectile ammunition

1143391 The British United Shoe Machinery Co Ltd
Improvements in or relating to the manufacture of shoes

1232273 Agfa-Gevaert Aktiengesellschaft
Photographic or cinematographic camera for use with film supplied in cassettes or cartridges

1337101 International Standard Electric Corporation
Two-wire to four-wire conversion circuit for a data switching centre

1360033 Nicholas Douglas McKay
Improvements in or relating to a comb

1391768 Salvatore Louis Santorelli
Improved golf shaft

1409160 Standard Telephon un Radio AG
A telecommunication switching system

1433725 Ballestra Chimica SpA
Method of preventing the formation of by-products during the sulphonation or sulphation of organic compounds

1462960 Chinoin Gyogyszer Es Vegyeszeti Termekek Gyara RT
Quinoxaline-1, 4-dioxide derivatives

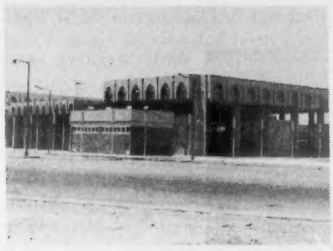
Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patent form no 45 within two months after the date of endorsement.

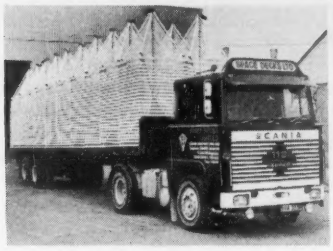
I. J. G. Davis, Comptroller

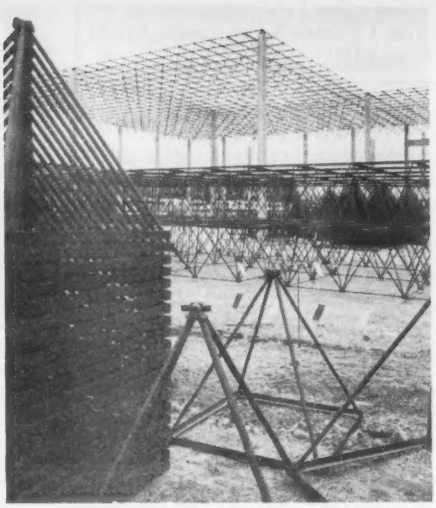
The Queen's Award for Export Achievement

has been awarded to Space Decks Limited

1978







In recent years Space Deck has reinforced its position as the major supplier of structural steel space frames with exports of over 300,000 sq.m. of Space Deck pyramids to the Middle East and Africa.

Projects included single and multi-storey roof and floor structures for schools, sports and recreational centres, airport terminal buildings and commercial buildings.

SPACE DECKS Limited

Chard, Somerset,
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Telephone 04606 4141/6
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New publications

Market conditions in the Gulf

In January this year, the Building Materials Export Group organised a visit to the Gulf states. The party consisted of representatives of 15 companies covering a wide range of products relating to the building and construction industry. The majority of the members had previously visited the area and had already established some links while others were unfamiliar with the countries visited and were researching markets for the first time. As well as meeting the individual needs of the party, the visit also provided an opportunity to publicise the wide range of products available from UK companies.

The group's findings have now been published and have been made available to non-members. They are of particular interest because they provide an analysis of the current position in this vital area for exporters. Useful general comments are made on the state of the market, the attitude towards British products, and the availability of financial facilities. Advice is also given on preparations to be made for future missions.

For each of the six states visited – Bahrain, Dubai, Kuwait, Qatar, Abu Dhabi and Oman – there is more detailed coverage of market conditions and future prospects. Also included for each country are lists of development projects already undertaken by British firms, British firms already operating in the area, the names of importers in each country, and useful addresses of commercial and governmental contacts (including British embassies and foreign chambers of commerce).

British Building Materials Sales Mission to the Gulf. British Building Materials Export Group, 26 Store Street, London WC1E 7BT. 1978. iv, 86 pages; paperback £25.00 (to non-members).

Serials for market research

Much of the documentation relating to market research is frequently to be found in periodical series. This has advantages because it ensures that the information is continuously updated with each new edition. The drawback is in keeping track of serials not issued on a regular basis.

With the help of its documentation service, the International Trade Centre has published a bibliography of the most useful serials held by them. The latest directory expands and updates a previous ITC publication, 'Annotated Bibliography of Product Periodicals', issued in 1975.

Based on the reproduction of catalogue entries of current holdings, arranged under standard international trade classification headings, the bibliography may not be very easy to use for anyone unfamiliar with the SITC system, although a very brief subject guide is provided. A clearer arrangement, plus a subject index, would have been a great asset.

Full details are provided for each title, however, including availability, frequency, price and a brief synopsis of its coverage – sufficient to facilitate ordering of copies direct from the publisher. And its wide international coverage makes this an invaluable source of reference for anyone requiring information on overseas markets.

Annotated Bibliography of Product Serials. International Trade Centre, Unctad Gatt, Palais des Nations, 1211 Geneva 10, Switzerland. 1977. viii, 229 leaves; paperback $25.

Selection of publications for review on this page does not necessarily reflect the views of the government, nor do the opinions expressed. Inquiries and submissions for review should be sent to *Trade and Industry*, New Publications Page, Room LG 17A, 1 Victoria Street, London SW1H 0ET, tel. 01-215 4136.

International protection for the consumer

Organisations for the protection of consumer interests have proliferated in Europe in recent years. The Commission of the European Communities has itself been active in the field with the establishment in 1973 of the environment and consumer protection service specifically to implement community policy in the area. A checklist of these various bodies in member countries has just been produced by the service.

It covers a large range of both official and non-official bodies, including agencies concerned with consumer interests in health and safety and food and drugs, as well as the protection of individual rights. Arranged by country, it provides full details – address, history and main functions – for each organisation.

Anyone interested in the international aspects of consumer protection should find this a useful reference tool.

The Consumer Organisations and Public Authorities. Commission of the European Communities. 1977. Available from HMSO. 60 pages; paperback £1.35 (ISBN 0 1 1937 306 8).

Opportunities down Mexico way

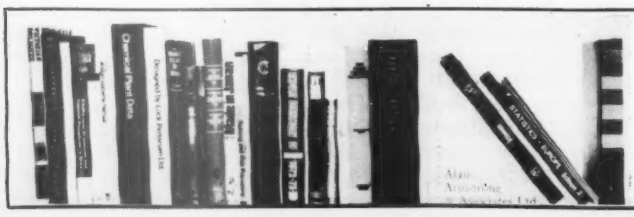
With Mexico's entry into the league of major oil producers, prospects for our exports over the next few years look encouraging. As the author of Metra Consulting's latest report informs us, 'Mexico is poised at an exhilarating moment in its history'. And it is at this moment that Metra has decided to add Mexico to the list of countries covered in its 'Business Opportunities' series.

The series has covered various countries throughout the world, and some reports have already been reviewed in *Trade and Industry* – Nigeria 16 September 1977, page 491, Indonesia 21 October 1977, page 120, and South Korea 17 February 1977, page 344. The addition of Mexico fills a gap on a subject where up-to-date business information is sadly lacking.

Aimed primarily at providing the answers to questions that might be asked by anyone considering entering the Mexican market, the survey should also serve as a useful reference tool for those already familiar with the area. It provides a large amount of general information on the country but concentrates in more detail on the economy. A particularly useful feature is the individual analysis of each major economic sector, and there are comparative figures to show how Mexico stands in relation to other nations. Information is also provided on the factors to be considered when trading and investing there. Many useful addresses of contacts in Mexico are listed, together with the names of the 500 largest companies.

The report offers a concise review of the Mexican economy and of the potential business opportunities. Its practical approach should prove useful to any organisation considering future business contacts in the area.

Mexico: business opportunities, by Metra Consulting and International Joint Ventures. Available from Metra Consulting Group Limited, 23 Lower Belgrave Street, London SW1W 0NS. 1978. ix, 373 pages; ringbound £97.00. (ISBN 0 9022311 1).



The books reviewed above – and many other business books are available immediately from stock at these booksellers.

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Sussex Place, Regent's Park, London NW1 4SA 01-723 3902

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New products

Power supply for sensitive equipment

Weir Instrumentation Ltd has introduced a bench power supply that incorporates a continuously variable current-limiting circuit to protect sensitive equipment during development or production test procedures.

Should effective load resistance fall to a point at which the Mini 400's supply-voltage setting is above the pre-selected limit, the unit automatically converts to a constant-current source so that actual output voltage is reduced to a level at which current limit is not exceeded. Once set, the current limit remains constant throughout.

Controls are labelled with international symbols for immediate identification. The compact 225 mm × 180 mm × 155 mm instrument delivers a stabilised output voltage variable from 0V to 30V at 1A dc maximum load. Load regulation is better than 0.05 per cent for a 100 per cent maximum load change, and line regulation provides less than 0.02 per cent change in output voltage from 10 per cent input voltage variation.

Ripple and noise are claimed to be below 1 mV peak-to-peak, and transient response is such that output voltage recovers to within 50 mV in less than 45 microseconds for a full-load step change.

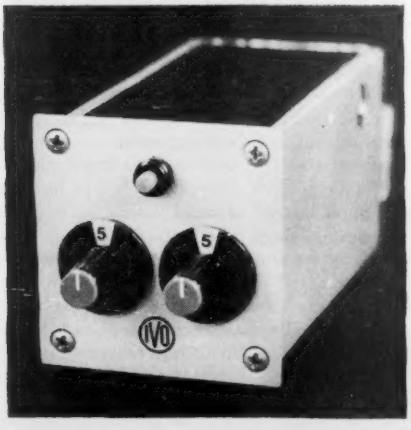
Standard models are equipped with a single-turn voltage setting control. A ten-turn control dial, with individually lockable precise positions, is optionally available and known as the model 400T. If required, models 400 and 400T can be supplied in a single housing. Both types conform to the relevant IEC specifications and can be operated at ambient temperatures from 0°C to 45°C.

Further information: circle 638

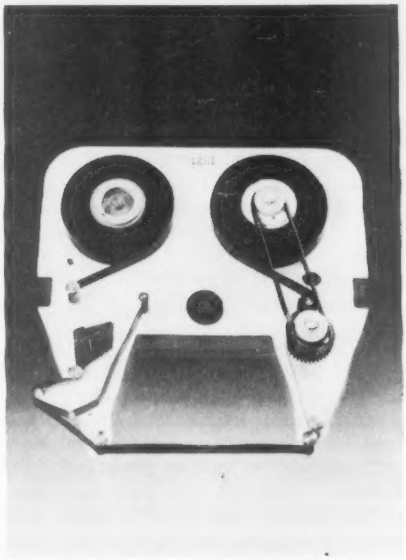
Low-cost electronic counter

This NE 636 electronic pre-determining counter from IVO Counters is designed for applications where a simple pre-determining device is acceptable but the speed of an electronic counter is essential. To save cost there is no visual display but when the counter reaches the preset number it gives an output signal and may then be reset automatically or manually. With a maximum operating speed of 1 MHz, it operates from most conventional ac and dc supplies.

Further information: circle 637



Reloadable ribbon-carrier cuts data-processing costs



This reloadable ribbon carrier made by Wessex Print Supplies can be used with most character printers and word processing systems.

Over 100 ribbons may be reloaded on a carrier which can be used with most character printers and word processing systems. Compared with conventional throw-away cassettes, the carrier is claimed by its manufacturers, Wessex Print Supplies, to halve ribbon costs as well as to improve the print quality.

Ribbons are each 8 mm wide and about 90 m long. Reloading of the carrier takes less than half a minute. Standard black ribbons are available in multi-strike or single-strike form. The former, suitable for consistently high-quality reproduction of text, can print about 175 000 characters per ribbon. Single-strike ribbons are recommended for small offset master plates and yield about 36 000 characters a ribbon. Colours other than black can be supplied to order.

The carrier requires virtually no maintenance except for keeping its drive mechanism clean and maintaining constant tension throughout the ribbon's length.

Further information: circle 639

Shinguard socks kick off to a good start

Socceroo pocket socks incorporate a unique fabric compartment designed to hold a player's shinguards in games like hockey and football. This simple idea, conceived during a Sunday morning soccer game led to the formation of a new manufacturing company in the north east, Murray James Sports. Taken on trial to the finals of the men's hockey world championships in Argentina in March, this British innovation is also undergoing player tests in the United States, West Germany and Holland.

Further information: circle 640

Electronic weigher gives 10-milligram readability to meet EEC rules

To meet criteria laid down by EEC legislation on measuring containers, Oertling Ltd has introduced the Metronic digital electronic weigher with dual-range capacities. Legislation now puts the onus firmly on manufacturers to weigh and measure bottles both empty and filled to pre-determined levels, over a period, and then calculate the deviation against the standards that have been laid down.

Metronic can be linked via an Oertling-designed interface to a Hewlett Packard 9815 alpha numeric programmable calculator. The Metronic weighs to 3 kg × 0.1 g readability or 300 g × 0.01 g readability. The calculator used with the Metronic is programmed to take into account the temperature of the filling liquid, as well as the number of constants involved in each test.

Further information: circle 641

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Technology news

Research for UK's energy needs beyond 2000AD

Research and development work on new and conventional forms of energy that may play an important part in supplying Britain's energy needs in the period up to the turn of the century and beyond is described in a report published by the Department of Energy on 15 May.

The report shows that in 1976-77 the Department of Energy, the nationalised fuel and power industries and the United Kingdom Atomic Energy Authority together increased their expenditure on research and development work by more than £34 million to £227.2 million. Of this, the Department of Energy spent £28.3 million, British Gas Corporation £18.2 million, the Electricity Council and electricity boards £41.7 million and the United Kingdom Atomic Energy Authority £118 million.

Projects financed by the Department of Energy in the period under review include:

Alternative energy sources
Work on wave, geothermal, solar, wind and tidal energy is established. It aims to prove the potential and timescale of the contribution they might make. The government will be replying shortly to the select committee on science and technology reports on alternative sources of energy and the Severn barrage and this will contain new proposals for expanding the funds available.

In addition to measures to stimulate home insulation, the Department of Energy has mounted a series of assessments on the use of energy in different industries.

Offshore energy technology
The department's research and development programme in this field is designed to support the safe and efficient exploitation of North Sea oil and gas reserves and complements the efforts of UK industry to improve its technological performance. The report also describes international collaboration in energy-related research and development through the EEC and the International Energy Agency.

In addition to the department's own programme, research and development was carried out by the nationalised fuel and power industries and by the United Kingdom Atomic Energy Authority. The authority undertakes a continuing programme of R and D on nuclear energy matters in consultation with the nuclear industry, the UK generating boards and the relevant government departments and agencies. Specific areas of research and development include work on reactor types and nuclear safety.

British Gas Corporation continued work to improve established techniques in support of exploration and production of natural gas, the development and demonstration of substitute natural gas and better methods of gas utilisation.

For a number of years, the major R and D effort of the Electricity Council and the electricity boards has been on electricity generation from nuclear and fossil fuels, the emphasis being on improving the operational efficiency, and reliability of existing plant and plant designs.

The National Coal Board's programme of work includes developing fully-mechanised coal-face systems, improving the reliability of machines and equipment and extending remote and automatic control and monitoring.

'Report on Research and Development 1976-77', Energy Paper 28, is available from HMSO, price £1.75.

New look for school science and everyday life exhibition

A touring exhibition on school science and everyday life introduced in January 1975 has recently been modified and updated by the Project-Engineers and Technologists for Tomorrow (PETT) resource unit at Southampton University. In its three years' existence, the exhibition has been sited at more than 50 schools, science and other centres in the United Kingdom from as far apart as Aberdeen and Plymouth.

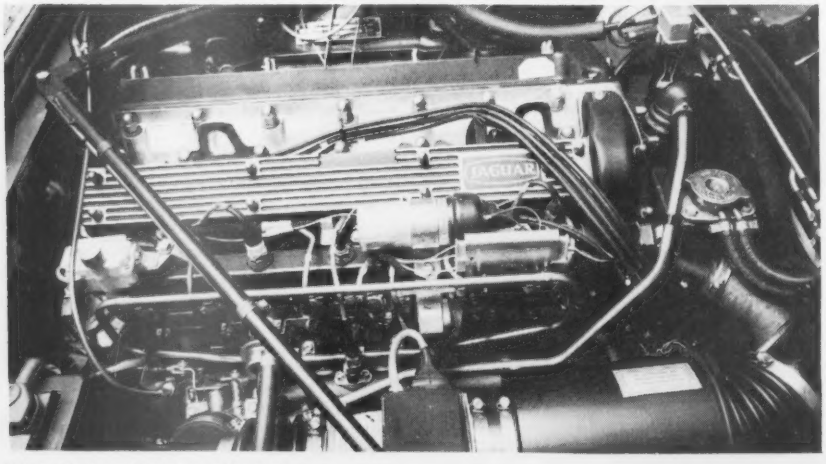
Among the 10 working models, designed to give visitors an insight into ways in which simple science has been applied to solve domestic, industrial and medical problems will be two new items. They show transmission of telephone messages by means of light rays and how a heat-transfer pipe works to cool, for instance, a power transistor. Exhibits have been designed to allow visitors to operate or to adjust them. Each solution is based on a topic which the average school-leaver can expect to have met in his school science course.

Demonstrations illustrate that knowledge of school physics can open the door to an understanding of many technical achievements encountered in everyday life.

School Science and Everyday Life is available to schools and education centres on free loan. Inquiries about availability of the school science and everyday life exhibition should be made to George Woodley, Information Division, Department of Industry, Gaywood House, 29 Great Peter Street, London SW1P 3LW; tel: 01-212 0942.

US Jaguars benefit from new fuel injection system

Jaguar's latest version of its six-cylinder 4.2 litre XJ saloon marks a significant advance. It is equipped with the latest anti-pollution technology, using Lucas/Bosch L-Jetronic fuel injection with feedback control from an exhaust sensor and a three-way catalytic exhaust converter. This enables it to meet the stringent Californian clean-air laws without depressing side effects on performance and fuel thirst. The new system works so well that Jaguar is offering it to Americans outside California, despite the fact that the federal pollution regulations are less demanding.



Ways of producing some plastic composites

The Production Engineering Research Association (Pera) is offering manufacturers its expertise on resin injection and vacuum impregnation methods for producing relatively large components in plastics and fibre composite materials. Both techniques offer distinct advantages over established moulding methods, and provide a superior surface finish on both sides of the component.

Resin injection and vacuum impregnation can be employed either separately or in combination instead of hand lay-up methods to produce casings or structures bearing light loads for machine tools, processing equipment and domestic appliances. The methods are particularly advantageous for making large components in quantities that do not justify expensive tooling up for injection or compression moulding.

Further information: circle 642.

Parliament

Monday, 15 May

Withdrawals from Gatt negotiations

Kenneth Clarke (Rushcliffe) asked what withdrawals had so far been made from the EEC's original offer in the general agreement on tariffs and trade multilateral trade negotiations; and if any further possible withdrawals were being considered.

Mr Meacher said that the commission had given their main negotiating partners a list of likely withdrawals from the industrial tariff offer made by the community in January. Details were confidential. Further adjustments to the offer may be needed in the light of the overall position in the negotiations and of changes that may be made in the offers of other countries.

South Africa

Christopher Price (Lewisham West) asked the Secretary of State for Trade when he intended to publish his first annual review of the code of conduct for companies with subsidiaries in South Africa.

Mr Dell replied that the timetable for reports from companies under the code of conduct of the nine would be indicated in the white paper containing the government's guidance to companies on implementation which it was intended should be published shortly. He expected that the reports would be numerous and detailed and they would need careful assessment. He would hope to publish the results as soon as that had been completed.

Helicopter noise

Toby Jessel (Twickenham) asked the Secretary of State for Trade on what dates he intended to monitor, by taking measurements, helicopter noise over Teddington and Hampton.

Mr Clinton Davis answered that monitoring of helicopter noise on the route which passes over Teddington and Hampton was started last autumn, but subsequently abandoned because there was too little traffic to provide worthwhile results. It would be resumed later this month and continued through June, when the route was normally used extensively.

Credit agreements

J. W. Rooker (Birmingham, Perry Barr) asked the Secretary of State for Prices and Consumer Protection when he expected to introduce regulations under section 60 of the Consumer Credit Act on the form and content of credit agreements.

Mr Fraser said that it was impossible to give a firm date at this stage. His department hoped to consult on proposals in the summer or early autumn.

Footwear applications

Mike Noble (Rossendale) asked the Secretary of State for Industry how many inquiries or applications had been received by his department for financial assistance under the footwear scheme; and of these how many were from firms in the north west.

Mr Cryer replied that 80 inquiries and 17 formal applications for assistance under the footwear industry scheme had been received. Of those, 15 inquiries and four applications had come from firms in the north west.

Industry Act assistance

Fred Silvester (Manchester, Withington) asked to what extent local business experience is employed in assessing assistance under the Industry Act.

Mr Cryer answered that as the criteria described, local and national industrial implications were taken into account in appraising applications for selective assistance. The local industrial context was provided through the government's regional centres which cover all localities in the United Kingdom, and maintained continuing contracts with the development and needs of industry in their areas. These offices included among their staff businessmen on secondment. For the main assisted areas, where structural problems and unemployment were at their most serious, the bulk of proposals were placed before independent regional industrial development boards, whose membership was drawn from the local industrial and financial community.

Pencil imports

Richard Page (Workington) asked how many pencils were imported into the United Kingdom in 1976 and 1977; and if he would express this figure as a percentage of the United Kingdom's production in those two years.

Mr Meacher gave the following information:

Millions

	1976	1977
Imports of pencils [1]	89	115
Imports as percentage of UK production [2]	37.0	46.8

Notes: [1] Pencils encased in wood or in a rigid paper sheath. [2] UK production data relate to sales of pencils, including coloured pencils, by UK manufacturers employing 25 or more persons.

Car exports

John Moore (Croydon Central) asked the Secretary of State for Trade if he would show the level of passenger car exports from the United Kingdom as a proportion of world trade in passenger cars each year since 1967.

Mr Meacher said that UK exports as a proportion of OECD exports of passenger cars measured in US dollars were as follows:

	Per cent		Per cent
1967	10.1	1972	5.3
1968	8.8	1973	4.7
1969	8.8	1974	4.6
1970	7.7	1975	4.4
1971	6.8	1976	3.7

Sources: OECD statistics of foreign trade and UN commodity trade statistics.
Note: Figures for world trade in passenger cars SITC(R) 732.1 were not available but OECD member countries accounted for about 95 per cent of world trade.

Mutton and lamb exports

Neil Marten (Banbury) asked for the destinations of United Kingdom carcase mutton and lamb exports in tonnes for the years 1976 and 1977.

Mr Dell said that the information on the export of United Kingdom carcase mutton and lamb was as follows:

Tonnes

Destination	1976	1977
France	15 576	19 341
Belgium/Luxembourg	6 708	10 284
West Germany	5 491	9 265
Italy	1 049	1 087
Switzerland	1 362	1 437
Nigeria	710	355
Libya	678	—
Other countries	1 031 [1]	2 832 [2]
Total	32 605	44 601

[1] 38 countries. [2] 48 countries.

Footwear imports

Mike Noble (Rossendale) asked what were the levels of footwear imports for the first quarter of 1978 from South Korea, Portugal, Sweden, India, Malaysia and the Philippines; and how these compared with the levels for the same period in 1977. He also asked what was the level of footwear imports into the United Kingdom during the first quarter of 1978: (a) by pairage and (b) by value; and how this level compared with the same period of 1977.

Mr Meacher gave the following information:

	Jan-Mar 1977		Jan-Mar 1978	
	Thousand pairs	Thousand £	Thousand pairs	Thousand £
Total imports of which:	39 183	69 348	33 417	63 606
South Korea	1 695	2 594	4 304	5 190
Portugal	380	1 003	714	1 791
Malaysia	1 474	899	2 030	1 312
India	1 052	824	1 675	1 158
Sweden	162	636	277	899
Philippines	72	81	434	139

Source: UK overseas trade statistics (SITC(R) and (R2) items 851.01-04).

Telephone waiting list

John Osborn (Sheffield, Hallam) asked the Secretary of State for Industry what were the numbers of telephone subscribers and potential subscribers on waiting lists respectively, in the United Kingdom; what were the comparable figures in January 1970, 1975, 1976 and 1977; and what he expected the position to be in 1985 and 1990.

Mr Huckfield said that the published report and accounts of the Post Office contained information on the size of the waiting list for telephones at the end of each financial year. The figures for the earlier years mentioned in the question were as follows:

March 1970	108 200
March 1975	102 000
March 1976	47 000
March 1977	38 000

The report and accounts for 1977-8 would be published later in the summer. The provision of information on the waiting list at other times, and forecasts of the size of the waiting list in future, were matters for the Post Office.

Industrial estates

David Mudd (Falmouth and Camborne) asked how many industrial estates were situated in the Falmouth and Camborne parliamentary division; how many new factories were planned on these estates; how much space was available for future expansion; and to what extent he and the local councils were in full agreement for the future development of these estates.

Mr Cryer said that there were seven industrial estates on which a total of about 28 acres of land was available for development. His department owned 8½ acres of this land and approval had been given to the building of two 5000 ft² advance factories for Hayle; two 5000 ft² advance factories and four 2500 ft² terrace units for Camborne; and 2 units of 2000 ft² for the development commission at Praze. His department maintained close contact with the local councils and was in full accord with them on future developments.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

Aid for Cornwall

David Mudd (Falmouth and Camborne) asked the Secretary of State for Industry by how much his department's expenditure per capita in the Cornwall development area exceeded, or was less than, that of the national average per capita in respect of his department.

Mr Cryer replied that in the period from August 1972 to 31 March 1978, assistance had been made available under the Industry Act 1972 in respect of undertakings located in the south west development area as follows:

	£ million
Part I Payment of regional development grant	22.3
Part II Section 7 offers of regional selective assistance	8.7
Part II Section 8 offers of selective financial assistance	0.3
	Total 31.3
Average per head of working population	£187.62p

In the same period assistance was made available as follows to undertakings located in the five main assisted areas of Great Britain:

	£ million
Part I Payment of regional development grant	1 414.4
Part II Section 7 offers of regional selective assistance	377.4
Part II Section 8 offers of selective financial assistance	120.6
	Total 1 912.4
Average per head of working population	£200.40p

Tuesday, 16 May

Oil threats

Michael Spicer (South Worcestershire) asked the Secretary of State for Trade whether the government would consider setting up a standard procedure whereby oil from tankers which broke up off the British coast, and the oil of which was as a result a threat to the coast, was burnt immediately and, if necessary, the tanker's hull destroyed by means of explosives.

Mr Clinton Davis answered that the department intended to study further the possibilities of burning any oil remaining in a wrecked tanker. There were, however, substantial difficulties and objections to dealing with a casualty by this method. 'On present information it seems unlikely that we could adopt burning as our standard response to such situations.'

Cross committee proposals

Neville Sandelson (Hillingdon, Hayes and Harlington) asked the Secretary of State for Trade if he would make a statement on the recent report of the joint committee appointed by the accountancy bodies to consider the Cross committee's proposals.

Mr Dell replied that the joint committee were to be congratulated on the speed and thoroughness with which they had done their work. It was of course a matter for the professional bodies concerned to consider implementation of the recommendations addressed to them. These recommendations would require careful consideration by all concerned; but he was sure that the profession would respond promptly and responsibly to the very significant lead which the report had given.

Tourist amenities

Sir George Young (Ealing, Acton) asked the Secretary of State for Trade if he would authorise the English Tourist Board to grant-aid tourist amenities in cathedrals and their precincts outside development areas.

Mr Meacher said that he received many suggestions for extending selective tourist project assistance more widely but it would put excessive pressure on a very limited budget to do so until the government could make available more money to support wider coverage.

Footwear from South Korea

Sir Geoffrey de Freitas (Kettering) asked the Secretary of State for Trade whether he was aware that in the first quarter of 1978 imports of footwear from South Korea increased by 167 per cent in volume to 4.5 million pairs, valued at approximately £5.5 million.

Mr Meacher said that he was aware of the facts which the questioner had set out. However, although imports from South Korea had been higher so far this year than in the corresponding period last year, total imports of footwear had been lower. Nevertheless the UK was concerned about the possible deflection of low-cost imports into the UK as a result of protective measures taken by other developed countries such as the USA and Canada. The EEC commission was holding talks with the main low-cost supplying countries, including South Korea, in order to ensure that their surplus production was not diverted.

Wednesday, 17 May

EEC – Greece negotiations

Kenneth Clarke (Rushcliffe) asked the Secretary of State for Trade what agreement had been reached in negotiations between the EEC and Greece on the adoption by Greece of the community's obligations in the field of external trade relations.

Mr Meacher said that Greece had agreed in principle to the adoption of the community's obligations in the field of external trade relations. Negotiations were currently in progress on the terms and timetable. The Greek government had given an indication of those areas where they wanted transitional arrangements. Detailed negotiations on transitional arrangements for this sector were just beginning.

EEC multi-fibre arrangement

Kenneth Clarke (Rushcliffe) asked the Secretary of State for Trade whether the admission of Spain, Portugal and Greece to the European community would involve any renegotiation of the EEC's new multi-fibre arrangement under the general agreement on tariffs and trade.

Mr Meacher said that new member states would on accession have to participate, with the rest of the community, in the MFA or any successor arrangement. The community's bilateral agreements with third countries would need to be revised to establish quotas for any new member state.

Trade with EEC in manufactures

John Moore (Croydon Central) asked what was the United Kingdom's deficit or surplus in trade in manufactures with each EEC country in 1977; and what were the comparable figures for 1978 at an annual rate.

Mr Meacher gave the following information:

UK CRUDE TRADE BALANCES IN MANUFACTURES

£ million

	1977	January to April 1978 at an annual rate
Belgium/Luxembourg	+320	+397
Denmark	+262	+201
GermanFederal Republic	−1339	−1675
France	−288	−437
Irish Republic	+512	+666
Italy	−380	−581
Netherlands	+288	+138

Note: The 1978 data is not seasonally adjusted and has been multiplied by 3 to produce an annual rate. Manufactures are defined as sections 5-8 of the standard international trade classification revision 2 (SITC REV 2). Balance of payments figures are not available.

Live sheep exports

Neil Marten (Banbury) asked for the destinations of United Kingdom live sheep exports for slaughter, showing numbers and values, from 1976 to 1977.

Mr Meacher replied that the available information relating to export of live sheep, exluding those for breeding was as follows. It was understood that most of those sheep would be destined for immediate slaughter.

	1976		1977	
Destination	Number	Value (£'000 fob)	Number	Value (£'000 fob)
Irish Republic	93 754	1 679	153 106	3 227
Belgium/Luxembourg	118 126	2 154	116 774	2 782
German Federal Republic	100 233	1 939	50 356	1 119
France	8 011	165	32 531	603
Netherlands	—	—	604	20
Sweden	—	—	217	7
Spain	—	—	4	less than 0.5
Total	320 124	5 937	353 592	7 758

Tugs in north of Scotland

Mr Grimond (Orkney and Shetland) asked the Secretary of Trade if he was satisfied that there were tugs available for the north of Scotland waters capable of handling the size of tankers which would use Sullom Voe and Flotta should they get into difficulties on voyages from those terminals.

Mr Clinton Davis answered that the department was not yet satisfied that there were a sufficient number of tugs available at Sullom Voe and Flotta capable of handling those very large tankers. In the light of the *Amoco Cadiz* disaster and the collision involving the *Eleni V*, and as part of the review of contingency arrangements for dealing with maritime casualties liable to cause oil pollution of the coasts, the department was considering the situation in the north of Scotland waters.

Drilling vessels in North Sea

Gordon Wilson (Dundee East) asked how many drilling vessels, semi-submersible platforms and jack-up platforms were in the ownership of United Kingdom companies or had United Kingdom ports of registration respectively; and how many were active in the North Sea.

Mr Clinton Davis answered that on the basis of information currently available to his department there were three UK-registered, UK-owned drilling ships and four UK-owned jack-up platforms, two of which were UK-registered; none of those was active in the North Sea. There were six UK-registered, UK-owned semi-submersible platforms, four of which were active in the North Sea. There were also seven other UK-owned and registered vessels designed for functions similar to those above; three were active in the North Sea.

National Enterprise Board

Sir John Rodgers (Sevenoaks) asked the Secretary of State for Industry, what estimate he had made of the cost effectiveness, in terms of the return on government investment, of the operations of the National Enterprise Board.

Mr Huckfield replied that the principal measure of the board's effectiveness in financial terms would be its success in meeting the financial duties which the secretary of state was required to set for it under section 6 of the Industry Act, 1975.

Accelerated projects scheme

Dafydd Wigley (Caernarvon) asked what was the total value of offers made and payments under the accelerated projects scheme in England, Scotland, Wales and Great Britain, respectively.

Mr Cryer gave the following information:

£ million

	Offers	Payments [1]
England	79.70	20.75
Scotland	2.15	1.11
Wales	2.25	0.77
Great Britain	84.10	22.63

[1] Up to 31 March 1978.

Thursday, 18 May

EEC agreement with Portugal

Nicholas Winterton (Macclesfield) asked the Secretary of State for Trade, if the EEC commission had negotiated a new provisional agreement with Portugal on global ceilings for cotton yarn and synthetic cloth; and, if so, if he would give full details of the agreement; if he would take steps to oppose the provisional agreement to increase the global ceilings for certain textile imports; if the agreement on textile imports was within the global ceilings given in his undertakings to the textile industry; if the EEC commission had negotiated a new provisional agreement with Portugal concerning all textile imports; and, if so, whether he would give full details of the agreement.

Mr Dell said that following discussions with Portugal, the EEC commission had submitted to the EEC council proposals for an agreement with Portugal which would involve a number of increases in the quotas, including the global ceilings, agreed by the council of foreign ministers on 20 December 1977. For the UK there would be increases in the quotas for cotton yarn, synthetic cloth, cordage and some clothing items. There would be decreases in the quotas for cotton cloth and jerseys. The UK and other member states were now considering these proposals and he expected the matter to be discussed at the next EEC council of ministers.

Detergents for oil slicks

Arthur Lewis (Newham North West) asked the Secretary of State for Trade to what extent the practise of using detergents to break up the continuing oil slicks, as being used off the Norfolk coast, had damaged or may damage the sea bed and

marine life; and whether he had made or would make, urgently, a thorough investigation into such matters.

Mr Clinton Davis replied that the government's objective in dealing with oil spillages was to protect the coasts and important concentrations of sea birds without damaging sea-bed and marine life. The dispersants used to combat oil pollution had to be approved by the Ministry of Agriculture, Fisheries and Food to ensure that they were unlikely to increase significantly damage to the marine biota beyond that resulting from the untreated oil. Some oil from *Eleni V* had reached the sea-bed and had fouled some trawling gear. However, this was not attributable to the use of dispersants.

Duties on fish

Neil Marten (Banbury) asked why the EEC import duties on Norweigian wetfish, round frozen fish and shell fish were only being reduced to 10 per cent; why this reduction was only for six months in view of the inadequate supplies of such fish in the United Kingdom and what was the justification for any import duties at all.

Mr Meacher said that the recent decision by the EEC council to temporarily reduce the duties on fresh, chilled, or frozen cod, haddock, hake and hake fillets imported for use by the processing industry to 10 per cent for the last six months of 1978 was taken against the background of continuing discussions about the community's internal and external fishery regimes. The agreement reached took account of the interests of both the fish processing and fishing industries in the community. In view of the uncertainties facing these sectors the reductions were made for an initial period of six months only. The position for the first half of 1979 would be reviewed in the autumn, when it would be possible to re-assess the demand and supply situation.

Levy on cinema tickets

Robert Rhodes James (Cambridge) asked the Secretary of State for Trade whether he was satisfied that the sums raised by the Eady levy on cinema tickets was being used for the purposes intended.

Mr Meacher replied that the Eady levy was distributed, as was intended, to the makers of qualifying films and to certain bodies that support the British Film Institute. The interim action committee on the future of the British film industry had its operation under review.

Imported footwear

Mike Noble (Rossendale) asked the Secretary of State for Trade if he was satisfied with the operation of the government's policy on imported footwear originating in South Korea, Portugal, Sweden, India, Malaysia and the Philippines.

Mr Meacher replied that while imports from these countries had been higher so far this year than in the corresponding period last year, they could not be considered in isolation from imports of footwear as a whole. Total imports of footwear in the first quarter of 1978 were in fact lower than those in the same period in 1977. Imports of footwear from South Korea, Malaysia and India were subject to surveillance licensing. In response to representations from a number of EEC member states, including the UK, the European commission had embarked on discussions with three of the community's main low cost suppliers (South Korea, India and Spain) about their future forecasts of sales to the community.

Ferrous foundry industry

Dennis Canavan (West Stirlingshire) asked the Secretary of State for Industry, about future prospects for the ferrous foundry industry.

Mr Huckfield replied that there were no official forecasts of the output of the ferrous foundry industry. As the overall economic activity of the UK recovers, particularly in the engineering, construction and vehicle industries, so the overall demand for ferrous castings would increase, although the level of activity would vary between sectors of the industry and companies within sectors. The government's ferrous foundry assistance scheme, which was contributing towards expenditure up to 31 August 1980 on approved capital projects, was helping to put the industry into a better position to meet such an increase in demand.

Grants to industry

Kenneth Clarke (Rushcliffe) asked the Secretary of State for Industry, whether his department were now attaching pay policy conditions to all offers of grants to industry under sections 1, 7 and 8, respectively, of the Industry Act 1972; what was his authority in law for attaching such conditions to offers; and whether he would set out the precise terms of the undertakings that were being sought.

Mr Cryer answered that in accordance with the policy set out in para 16 of the white paper 'The Attack on Inflation after 31 July 1977', and following the practice in earlier phases of pay policy, in considering applications for discretionary assistance under sections 7 and 8 of the Industry Act 1972 account was taken of the company's pay settlements in deciding whether assistance should be provided. Offer letters reserved the right to refuse payment if, at the time for payment, pay policy had not been complied with. This procedure did not apply to the provision of regional development grants under section 1 of the act, since these did not normally involve the exercise of the secretary of state's discretion. The secretary of state had been advised that such conditions were relevant to the purposes of the legislation and consequently it was proper for them to be included. The precise terms of individual offers were negotiated in each case with the applicant company and were not disclosed.

NEB investment in the north west

John Evans (Newton) asked the Secretary of State for Industry if he would list the firms in the north west region of England, excluding Merseyside, in which the National Enterprise Board has an investment.

Mr Huckfield said that the board had investments in the north west region excluding the Merseyside special development area in the following companies:

British Leyland Ltd
British Tanners Products Ltd
Data Recording Instrument Co Ltd
Fairey Engineering Holdings Ltd
Ferranti Ltd
Francis Shaw and Co Ltd
Hird Brown Ltd
ICL Ltd
Twinlock Ltd

He was sure the NEB's regional board for the north west would welcome, and consider seriously, any further proposals from companies in the area for investment by the board.

Planning agreements

James Sillars (South Ayrshire) asked the Secretary of State for Industry, how many statements he had issued on planning agreements under section 21 of the Industry Act 1975.

Mr Cryer answered that the secretary of state had issued one, on 9 March 1977, in respect of Chrysler (UK) Ltd.

Friday, 19 May

Report on newspaper wholesalers

Ioan Evans (Aberdare) asked the Secretary of State for Prices and Consumer Protection when he expected the report of the Monopolies Commission on the wholesale supply of national newspapers and periodicals in England and Wales — refusal to supply and participating in retailing — to be published.

Mr Fraser replied that the secretary of state expected to publish the report very shortly.

Official what's what

Second edition of the Guide to Official Statistics

The second edition of 'the official what's what', has been produced by the Central Statistical Office. That was one name given to the Guide to Official Statistics when it first appeared in 1976.
Now the second edition (HMSO, £8.25) offers a complete update. There is detailed information on 2500 statistical sources covering nearly 800 topics. All official and important non-official publications offering statistics relevant to these subjects are listed in over 400 pages.
For each topic there is a full description of all the published sources available – regular publications and special reports, articles and analyses etc with significant statistical content, going back at least a decade.
For each source identified, relevant publication details are listed in a separate bibliography.
An alphabetical index locates the occurrence of 3000 'key words' throughout the main part of the guide.
There is also a list of contact points in central government departments for further information.

Major award

The first edition of the guide became the first publication from a government department to win a coveted award from the Library Association – the Besterman medal 'for an outstanding bibliography or guide to the literature'.
Over 6000 copies were sold and it firmly established itself on library shelves all over the country as the definitive work on statistical sources.
The material for the guide is held on computer and has been updated continuously since the first edition was published – every important new publication or article of relevance fed in, described and indexed.
Thousands of separate amendments and additions have been made in maintaining this as a unique and indispensable guide for librarians, researchers and users of all kinds of official statistics. The Open University is currently considering adopting the second edition as a set book.
This major reference book is regarded as an important development in the service provided by government to potential users of its statistics. In addition it is seen as a significant contribution to the government's general aim of creating easier access to the information it produces.

European community news

Main agreement on MTNs on course for July

Agreement on the main elements in the Gatt multilateral trade negotiations should be reached by mid-July, and before the world summit meeting in Bonn scheduled for that month, according to representatives of the main parties involved, who met in Geneva on 9 and 10 April to assess progress.

The representatives included Robert Strauss, United States special trade representative, Commissioner Haferkamp of the European communities, and Minister Ushiba of Japan. Details of the negotiations should be settled before the end of the year.

At the April meeting there was some convergence of views over the question of subsidies and countervailing. The United States, because of strong congressional pressure, has been seeking a tough international code disciplining the use of domestic and export subsidies which it regards as leading to a distortion of normal trade flows. The community and Japan have been seeking clarification of a corresponding United States commitment only to levy countervailing duties on imports where these cause its own industry material injury. There has been more of a common recognition of each other's problems rather than a common recognition of how these might be solved in a mutually satisfactory way.

Some progress had been made among the developed countries on acceptance of the communities' proposal that safeguard measures taken under article XIX of the Gatt could be taken on a selective basis. There are still major differences of view, however, over the framework within which such action might be taken.

There was agreement that work on agricultural requests and offers should be stepped up and that the work of the agricultural subgroups on meat and dairy products should be actively pursued, and that the attempt to negotiate a new international wheat agreement should be continued.

There was some narrowing of differences in a number of technical areas over non-tariff measures codes of conduct – for example, government procurement, standards and customs and valuation.

It was agreed that further consideration should be given to possible measures providing special and differential treatment for developing countries in all areas of the negotiations where feasible and practical. In practice, however, it was becoming clear that the room for manoeuvre in this area was very limited.

It was noted that all the main participants had now tabled industrial tariff offers and that these would now be examined to establish a general reciprocal balance. The EEC has tabled requests for improvements to the United States and Japanese offers, concentrating on exceptions and less than formula cuts where there is a community interest. The commission has also told the Japanese that the community expects reductions which would balance the real value of its offer. Mr Ushiba said that Japan was considering a supplementary offer and the United States has tabled requests for improvements in the EEC offer.

The community has been considering its own offer to cut its industrial tariffs in the light of the initial United States and Japanese offers. After a series of meetings in Brussels (including the council of ministers on 4 April), agreement has been reached on a long list of products which the community will withdraw from its original offer. This 'hard-core list' of withdrawals has now been presented in Geneva. It reduces the overall trade-weighted average value of the EEC offer to about 32 per cent, compared with an average weighted cut in its initial offer of about 40 per cent. In most cases the withdrawal takes the form of an offer to make a lesser cut than that required by the full application of the original tariff-cutting formula. In some cases the community proposes to make a total exception of the product concerned.

In addition to this list, the community has said that it may make further withdrawals in the light of its overall assessment of the final value of offers made by the United States and Japan and, in particular sectors, of their response to the community's requests for significant improvements in their initial offers. This second and more flexible list of products, which may be deployed according to detailed progress in the negotiations, is known as the 'conditional list'.

Detailed bilateral negotiations are proceeding with the other participants in the MTNs, including the more advanced developing countries, involving the exchange of requests and offers in the industrial tariff, non-tariff measures and agricultural fields. Many of these countries have so far been unable to apply the agreed formula to their industrial tariffs.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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Parliament
Withdrawal from Gatt 421

Overseas trade news
Austria to introduce new lorry tax 428

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Country data
Denmark 436, Italy 437,
United States: imports of speciality steels 437

Statistics
Foreign arrivals in the UK 445

Examination of auditors proposed

Examination of theoretical and practical professional competence in auditing at graduate level is the central feature of the eighth 'company law' draft directive, which has been submitted by the European commission to the council of ministers.

The directive is aimed at harmonising the minimum qualifications required in EEC member states to audit the annual accounts of limited liability companies.

The content of the examination is specified in the directive. Special provisions are included to allow persons already practising as auditors, who do not fulfil the conditions laid down in the directive, to be exempted from the need to pass the examination of professional competence. The possibility of recognising equivalent overseas qualifications is also provided for.

This eighth 'company law' directive supplements previous proposals for a fourth directive on the annual accounts of limited liability companies, a fifth directive on the structure of companies, and for a seventh directive on group accounts.

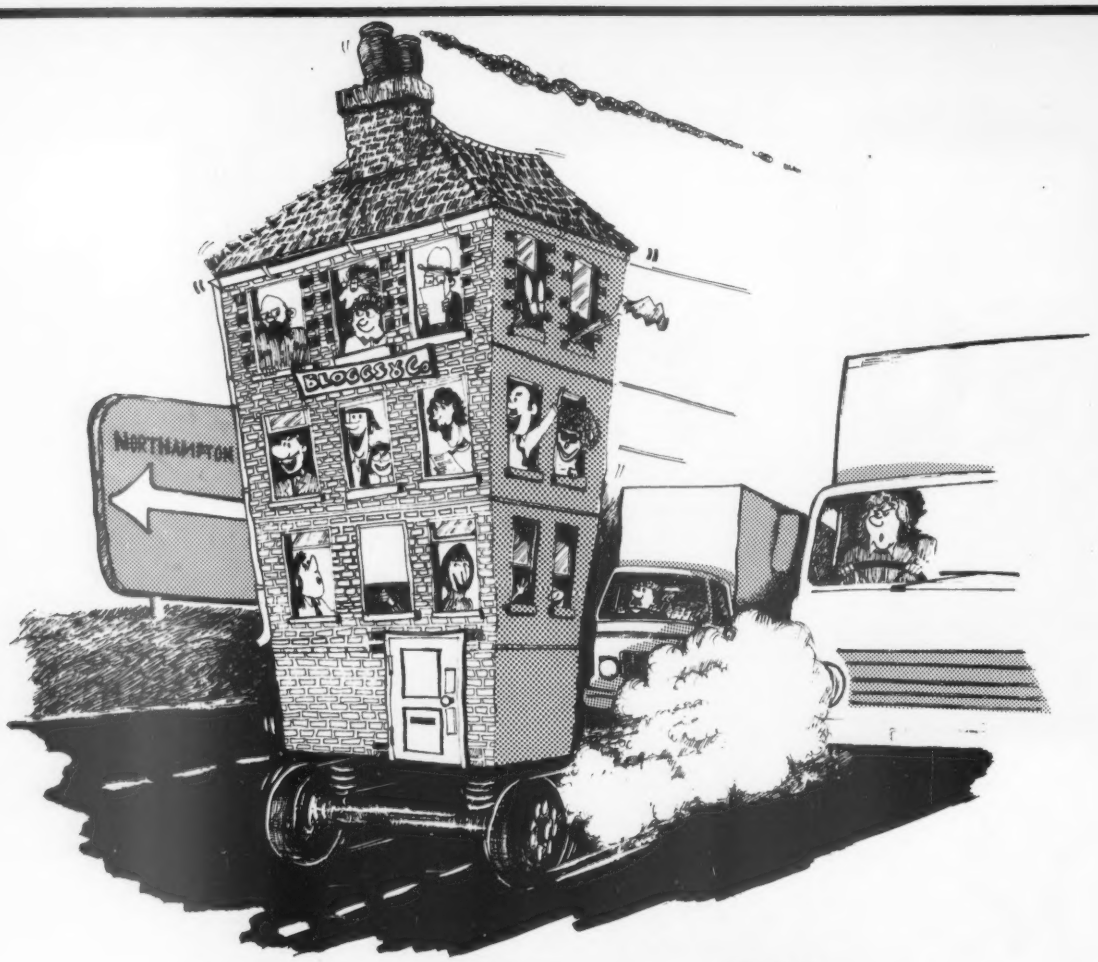
The opinions of the European parliament and the economic and social committee are being sought on this latest proposal. Within the UK the Department of Trade will in due course be seeking the views of interested parties.

Government proposes vice-president for EIB

Mr C. R. Ross will be proposed to succeed Sir Raymond Bell as a vice-president of the European Investment Bank by the Prime Minister and the Chancellor of the Exchequer on behalf of the government. Sir Raymond Bell is retiring on 30 June.

The management committee of the Euro-

May 1978
use our good offices
Trade and Industry
special report



Get your office moving up the M1

Actually we told Mr Bloggs he didn't need to bring the office with him. Since 1970 1 million sq ft of office development has been added to the 1.25 million sq ft previously occupied in Northampton's town centre, and a further 1.5 million sq ft is still being developed. Campus sites are also available on the major industrial development at Moulton Park.

As well as Northampton's central location, affording ease of access and distribution to all parts of the country, there are substantial savings to be made. Office concerns relocating from Central London can save up to 70% of their expenditure on rent and rates alone.

Northampton has tremendous advantages to offer firms wishing to relocate their offices. The expansion of this historic county town means excellent homes for your staff to rent or buy, new shops, new schools and new opportunities for growth and success. Its labour relations record is amongst the best in the country.

For further details phone 0604 34734 or write to:
L Austin-Crowe, Chief Estate Surveyor,
Northampton Development Corporation,
2-3 Market Square, Northampton NN1 2EN.

use our good offices

Trade and Industry special report

Industrial relocation, both national and international, is a much-discussed and widely-practiced solution to the economic and industrial problems of both companies and nations. But surprisingly little is heard of the increasingly important parallel developments in national and international offices and associated services. This special report explores the attractions of Britain as an office centre for Europe, looks at the thinking behind the office location decisions of multinationals, and finds that the new initiatives for the redevelopment of the inner areas of Britain's major cities could have far-reaching implications for office development.

How multinationals choose their locations
John Dunning, professor of international investment and business studies, University of Reading
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New to the office
Alan Williams talks to Raymond O'Brien, Merseyside County Council's new chief executive
page 14

A new role for LOB
Anthony Prendergast, chairman, Location of Offices Bureau
page 6

The right base
John Macadam, chairman, BAT Industries
page 10

Down in the dock-lands something's stirring
C. N. Beard, director, Docklands Development Team
page 22

Banking on Stratford
Morgan Guaranty's move to Stratford, east London
page 28

Master move
Barclaycard looks north
page 30

Contact points
page 32

Over a quarter of jobs in England and Wales are office jobs. By 1981 offices will probably provide about 30 per cent of total employment. So office employment is very important to the working life of the country. And it is getting more important.

Because the office sector is both large and growing, the location of office employment matters a good deal to the government, particularly because new offices, in the right places, can bring both economic activity and physical redevelopment to areas where they are badly needed. We are concerned both to improve the distribution of office employment in this country, steering it to the assisted areas and to the declining areas of our inner cities, and also to attract from overseas the office activities of multinational businesses.

Accordingly, last summer, I asked the Location of Offices Bureau to use its well-tried and successful methods of influencing office location on two additional objectives: first bringing international concerns to locate office employment in Great Britain (including in London of course); and second promoting office employment in the inner urban areas of our great cities; again, this includes London – though the emphasis is on office development in the older boroughs around the City and the west end.

The Location of Offices Bureau's success in the past lies in its ability to provide a factual information service to business management; and in making its experience of office-movers available, as advice, to others (including local authorities) interested in the attraction or development of offices. This supplement is a characteristic contribution to public understanding of particular aspects of office location, with special emphasis on locations in inner city areas, and the location decisions of international companies; I very much welcome *Trade and Industry's* initiative in organising this supplement.

Peter Shore
Secretary of State for the Environment

How multi-nationals choose their locations

John Dunning, Professor of international investment and business studies at the University of Reading, is looking at the factors governing the office location decisions of multinationals.

The reasons why multinational enterprises (MNEs) choose one particular country in preference to another when siting their manufacturing activities, and the effect this has on the economy of both home and host country, has been the subject of much research in recent years. But, surprisingly, comparatively little attention has been paid to the factors influencing the location of the offices of such companies.

To the extent that some office functions of MNEs need to be located in the same place as their main activities, this is understandable. But the majority, and certainly the most important office activities of MNEs, are not of this kind. There are two in particular, on which I shall concentrate here, whose locational needs may be quite different from those of non-office activities. They are, first, the branch or affiliate offices of multinationals which are engaged in the production of office services, or what we shall call office industries; these include some marketing-oriented activities, such as finance and insurance, commodity broking, advertising, market research and a whole range of business and consultancy services. In each case, the output or finished product of the branch office is sold directly to external customers. The second type is the regional office of a multinational primarily engaged in non-office activities, whose output – which consists mainly of information and specialised services undertaken on behalf of the rest of the MNE – is not externally marketed.

Branch offices of office industries

The theory of international production – production financed by foreign direct investment and undertaken by MNEs – suggests that, first, such production is only possible where the organisation possesses some technical, managerial, financial or marketing advantage, such as access to essential raw materials, patent or trade mark protection, or economy of size, which the indigenous company does not possess, or possess to the same extent; and second, that this production is more economically undertaken in the country of marketing than in the home country of the multinational. Thus, for example, for an American firm to produce pharmaceuticals in the UK it must have some competitive advantage over a local UK firm and find it better to site its production plant in the UK than in the USA or a third country.

Applying this theory to the setting up of branch offices of MNEs in office industries, one would expect these to be steered towards locations where the local environment offered them the most favourable producing opportunities and/or where the competitiveness of indigenous firms was weak. The strong concentration of foreign-based multinationals in many office industries in the UK or other European centres is explained predominantly by the attractive facilities offered by the UK, and in particular London, as a production base not only for supplying the UK market but the European and other markets as well. These advantages outweigh the fact that, in most of these sectors, there is strong competition from UK firms. The advantages of being at the centre of things – the so-called agglomerative economies – are all-important.

At the same time, MNEs do not always supply to the same markets as UK firms. Obviously, customer loyalty explains why the branch banking of American and Japanese multinationals is directed to servicing the larger US and Japanese enterprises in the country – they will be located where their customers are. In other cases, the branch offices of MNEs are more footloose and more dependent on the facilities offered by alternative locations. In some lines of activity, such as those associated with London's trading function, competition from other cities has caused some office activities to decline. Some of the more routine office operations, such as those in finance and insurance, have also been dispersed as new markets have opened up in the Middle and Far East. But others, like the Euro-dollar business, have taken their place, and with London's unique combination of complementary business and financial services and its continuing high level of expertise, it is continuing to attract branch offices of MNEs.

But competition for offices of multinationals is increasing, both from other cities in Europe and further afield. To continue its premier position the UK, and London in particular, must be competitive in the facilities it offers and the cost of these facilities. On many sides, the situation is good. Salaries are still well below those of European competitors, and the environmental and telecommunications services are highly regarded. On the other hand, partly because of high demand, rentals in central London are well above their European counterparts. This, together with relatively high levels of direct taxation, may discourage some firms.

Regional offices

The choice of location for regional offices of multinationals is guided by rather different considerations. Unfortunately, very little is known about either the numbers employed in such offices in Europe, or of the functions performed by them. It is hoped that current research being conducted by the Location of Offices Bureau will help shed light on these questions, for the employment implications may be important.

Several large US-based MNEs employ more than 1 000 people in their European regional headquarters. Usually quite a high proportion of these are in management, administrative or senior clerical and secretarial positions. At the other extreme, one very large Japanese company employs less than 30 people in its London regional office.

Obviously, much depends on the functions performed by the offices, which vary considerably between companies. Sometimes, they are very specific. Several companies operate regional computer facilities in Europe but no other facilities. Some operate separate regional offices for each of their main product lines, while others are organised on a territorial basis.

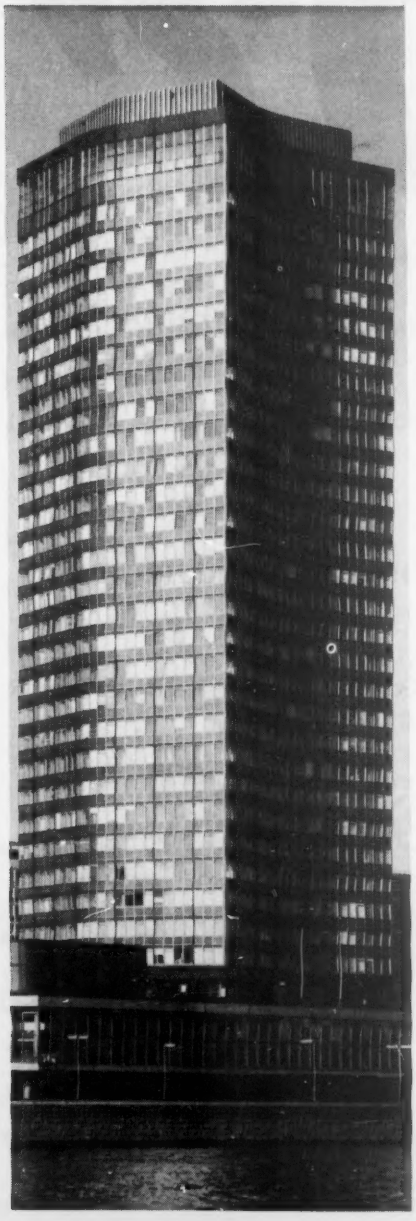
The main activity of a company, the extent to which it is involved as a multinational, and its particular product or marketing strategy, all influence the functions of its regional office. This explains why some offices are predominantly trade or marketing oriented, such as those of the Japanese trading companies, while others operate as scanners for prospective investment outlets of their main activities.

A third group is mainly interested in acquiring information for either the affiliates for which it is responsible or its parent company. A fourth group is geared to providing managerial coordination, administrative and accounting facilities and the like for the group and acting as intermediary between the parent company and the branches.

A recent survey of the location of regional offices of MNEs in Western Europe prepared

by ***Business International*** gave some details of the geographical distribution of some 616 offices, and the accompanying table is derived from data presented in this report; it should be noted that some MNEs may have more than one office in Western Europe.
The picture revealed by the table is fairly clear; US-owned MNEs predominate. They account for 80 per cent of all offices, while Japan comes second a long way behind with 8.6 per cent and Canada and Sweden follow with 7.1 per cent between them. The table shows that the propensity to set up a regional office varies directly with geographical distance from the home country. Even within Europe, there is a North/South alignment, with Swedish firms favouring southern European locations.
The UK is host to the largest number of regional offices, with Switzerland, Germany and Belgium following. London boasts 85 offices, while Brussels, with 75, is not far behind, proving especially attractive to US MNEs. Dusseldorf has half of the Japanese regional offices in Europe – more than twice the number in London. France, on the other hand, seems only to attract US companies.
Within the countries listed, the decentralisation of firms outside the main centres is most marked in the UK, where nearly one third of regional offices are outside London, and in the Netherlands and Switzerland.
Since regional offices are designed to meet the needs of the organisation of which they are a part, and thus do not compete with indigenous firms, their presence in a particular country depends on, first, the strategy of the MNE towards the setting up and functioning of a regional office and, second, the locational attractions of particular sites. Apart from regional offices which have very specialised needs which only one country can supply, they tend to be the most footloose of all office activities of multinationals not only in their initial location but in their tendency to switch locations.
The siting of regional offices in Europe has gone through several waves of popularity in the post war period. In the 1950s, many US-based companies set up offices in Switzerland, combining management functions with those of a trading or holding company. But changes in US corporate tax regulations reduced the attractiveness of Swiss locations.
Instead, in the 1960s, as the manufacturing operations of multinationals gathered momentum in Europe, and were spurred by the move towards European integration, more companies felt the need for regional offices to replace the European division located at the parent company's office. A move towards a large central city also became more popular; there were several contenders, each with its particular advantages, but during this period both Brussels, with the attraction of the EEC headquarters, and Paris, with its ambitious office development programme, made the running.
This trend was later reinforced by the growth of profits earned by multinationals in Europe, and Britain's membership of the EEC; the UK in particular benefited from this latter development.
But now, multinationals are again taking a close look at their European offices. Inflation in Europe and changing tax regulations in the US have made companies think again about the extent and form of their European office operations. Certainly there have been switches of regional offices within the same company – both in location and function.
How does London currently compare with other European centres? This question is now being researched in detail but the short answer seems to be very well. This seems to be basically because the UK offers a particularly unique package of facilities required by regional offices. Other cities may score on particular points, but each has quite serious drawbacks. Paris, for example, is not felt to be so international in its business orientation or outlook while there are difficulties in getting work permits in Switzerland, and Brussels cannot offer as wide a range of financial services as London. Moreover, the high cost of dismissals is a further disincentive. In addition, the language, cultural and legal attractions, particularly the commercial legal system, favour Britain, while on the personal front, most American and many Japanese executives find UK housing, educational and general living conditions both familiar and to the liking of their families. The main complaints seem to focus on personal taxation and, in recent months, rising rents in central London. London again has an excellent reputation for telecommunications and transport facilities, both particularly highly valued by multinationals with their need for a quick exchange of information, and easy travel for their executives.

Millbank Tower, Vickers' headquarters on the bank of the Thames.



Regional headquarters of multinational enterprises in Europe, 1976

Number

European location		Parent country: United States	Japan	Sweden	United Kingdom	Canada	UK/Holland	Germany	France	Italy	Belgium	Other	Total
UK	London	72	11	—	—	2	—	—	—	—	—	—	85
	Other	35	1	—	—	2	—	—	—	—	—	1[a]	39
Belgium	Brussels	70	3	—	—	1	1	—	—	—	—	—	75
	Other	7	—	—	—	—	—	—	—	—	—	—	7
Denmark	Copenhagen	16	1	—	—	—	—	—	—	—	—	—	17
France	Paris	43	—	—	—	—	—	—	—	—	—	—	43
	Other	10	—	—	1	—	—	—	—	—	—	—	11
Germany	Dusseldorf	20	26	3	1	1	—	—	2	—	1	—	54
	Frankfurt	29	—	3	—	1	2	—	1	3	1	—	40
Italy	Rome	14	—	—	—	1	—	—	—	—	—	—	15
	Milan	23	2	5	3	1	1	—	—	—	—	—	35
Netherlands	Amsterdam	14	3	1	1	—	—	—	—	1	—	—	20
	Other	16	1	1	1	—	—	—	—	—	—	—	19
Spain	Madrid	17	2	7	2	—	—	1	—	—	—	—	29
	Barcelona	4	—	1	1	—	1	2	—	—	—	—	9
Sweden	Stockholm	8	—	—	1	—	1	3	1	—	—	—	14
Switzerland	Geneva	37	—	1	—	1	—	—	—	—	—	1[b]	40
	Other French	13	—	—	2	—	—	—	—	—	—	—	15
	Zurich	23	1	—	—	1	—	—	—	—	—	—	25
	Other German	22	1	—	—	1	—	—	—	—	—	—	24
Total		493	52	22	13	12	6	6	4	4	2	2	616

[a] South Africa [b] Australia

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'Sounds good. You think we should put the U.K. Operation there, right? Why?'

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'That's fast'.

'There are places all ready and waiting from 1,500 square feet...'

'Bit small?'

'...to 100,000 square feet. And there are some very nice sites available to build on'.

'You on commission?'

'Then there's communications. It's right on the M1, and the A5 goes right through the place, so does the main rail link from London.'

'Hey, slow down, what's all this afive?'

'The M1 is the main motorway from London to Birmingham, the A5 is the...'

'Yeh okay. Highways, highways'.

'There's no problem with housing the staff. And I don't think we'll have anything but compliments about the place. It's got good shopping,

lots of schools, plenty of wide open spaces, lots of good pubs. It's just a few miles outside London. And Oxford, Stratford, Cambridge are all easy drives'.

'Yeh. Fine, fine'.

'And it's the perfect base for serving Northern Europe. Apparently that's one of the reasons why Rank Xerox moved in'.

'Americans there already?'

'Oh yes, Coca-Cola, Nacanco, Hammond Organs, Reads, Allen-Bradley, Redken Laboratories, Southland Corporation'.

'Great. I'm sold'.

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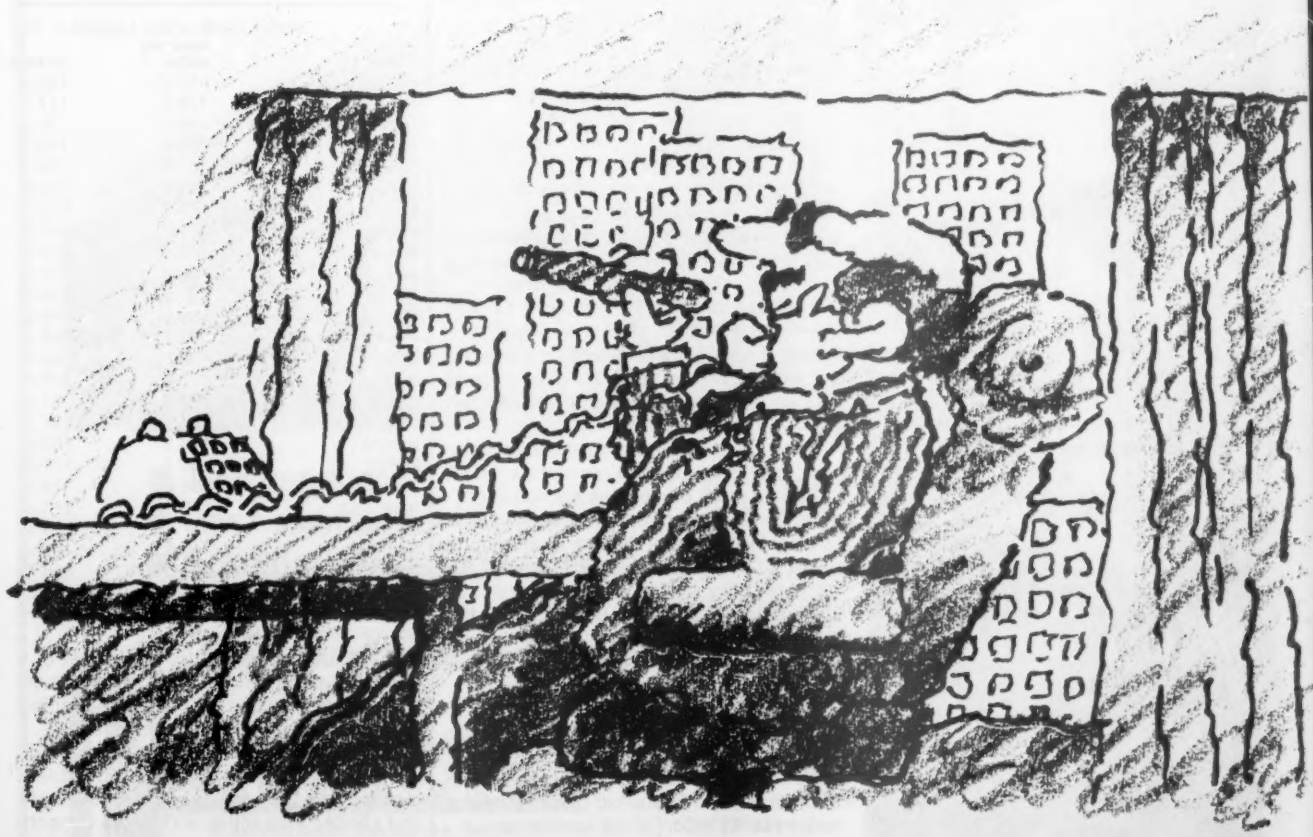

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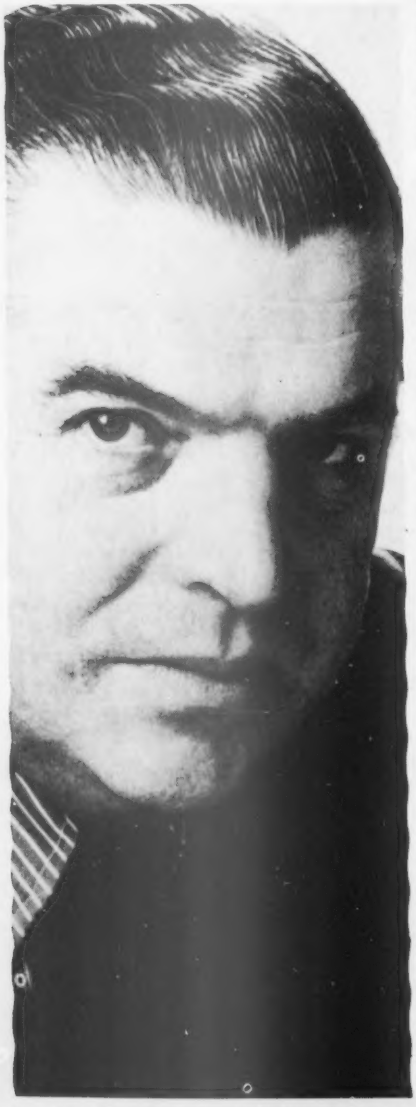
A new role for LOB

Anthony Prendergast, chairman of the Location of Offices Bureau, outlines his new international remit.

This year, for the first time, Britain has a specialist agency whose job it is to encourage and help firms from overseas to set up offices in Britain.



This is one of a number of new roles recently given to the Location of Offices Bureau – the official information and advisory service dealing with all matters relating to office location in the UK – since its sphere of operations was extended by the Secretary of State for the Environment last year.

The bureau was set up in 1963 with the purpose of encouraging firms to move out of the congested areas of central London. It has, during those years, helped over 2000 firms to move some 150 000 jobs to various parts of the country.

Last year, however, increasingly aware of the part played by offices in the national economy and the growing importance of office employment, which now accounts for over a quarter of the working population of the UK, the original terms of reference of the bureau were revised. The new remit gives the bureau the task of 'promoting a better distribution of office employment throughout the UK', allowing the bureau to extend its services to businesses in all parts of the country, and to play a part in the present drive to revitalise and redevelop certain inner city areas in need of industry, employment, housing and other services. These include parts of London, where office development could greatly contribute to the economic revival of older areas in some inner boroughs.

In addition to these new areas of activity at home, the bureau was given the job of trying to attract firms from abroad to establish offices in the UK.

But how does the bureau see the development of its role in promoting the efficient and proper distribution of office employment in Britain? And in particular, how can the bureau be of help to overseas firms considering Britain as a suitable location for the establishment of an office? Already the bureau has commissioned research to discover how and why multinational firms make their choice of location, and which factors are likely to play the most important part in their decision to locate in any one country. And the bureau itself is rapidly building up a system of information to help overseas firms thinking of setting up in Britain for the first time.

What can Britain offer to foreign firms considering the location of an office here? In common with many of its European neighbours, Britain has suffered the effects of high inflation and world recession in the past few years.

A number of determined measures, however, have helped in the present swing towards a more prosperous economic outlook. A measure of good management, the successful holding of the rate of inflation to below 10 per cent through a voluntary incomes policy, and a measure of good luck, the exploitation of natural resources like the North Sea oil, are only two of a number of factors that are helping Britain enter a phase of relative future stability.

The UK is ideally situated for a European base. The language of the country is probably the most widely used in international commerce. Britain is an active member of the European Economic Community and consequently a part of the world's largest market. Communications are among the best in the world. Most of the world's leading

Britain's favourable cost of living

The cost of living in Britain compares very favourably with most other countries, as the following table demonstrates.

London compared with other centres

Index figure where London = 100

Centre	Excluding shelter	All items
Amsterdam	150.7	133.2
Athens	123.3	117.3
Barcelona	88.6	79.5
Brussels	128.0	118.3
Copenhagen	161.1	142.1
Dublin	126.5	110.5
Dusseldorf	159.5	139.7
Hamburg	171.6	157.8
Helsinki	143.9	128.5
Lisbon	105.8	98.7
London	100.0	100.0
Madrid	89.6	86.2
Manchester	96.2	83.3
Milan	104.3	90.3
Paris	123.6	109.4
Rome	100.0	91.9
Stockholm	163.9	138.8
Vienna	149.9	150.0
Zurich	180.1	171.0
Johannesburg	86.6	78.5
New York	135.1	141.2
US (West Coast)	117.7	108.9
Sydney	119.8	109.9
Tokyo	221.3	238.7
Toronto	95.9	84.8

Source: Inbucon March 1978

The index is calculated from a basket of goods covering a wide variety of consumer items representative of European spending patterns. The items are grouped under eight headings – food, drink and tobacco, miscellaneous goods, household durables, clothing and footwear, services, transport and shelter. Quantities and prices of each group are weighted in order to establish a comparative index.

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banks are represented in London. Of prime importance on the list of deciding factors of most firms considering setting up in Britain is the traditional excellence of the commercial services of the City of London, many of which have been developed over several hundred years. London is a major centre for foreign exchange and provides probably the most flexible of international money and capital markets in the world. The British commodity market, dealing with items ranging from metals to rubber and fibres, is one of the most comprehensive in the world, and the City's leading role in the world of insurance enables coverage of almost every type of insurance requirement.

Britain has always welcomed investment from abroad and is traditionally hospitable to foreign companies wishing to operate in the country. Once a firm is established, it is treated in exactly the same way as its British counterparts, and thus incentives are available through the Department of Industry to overseas firms who locate offices in the Areas for Expansion in exactly the same way as they are available to UK firms. These areas include major centres such as Glasgow, Manchester, Liverpool and Newcastle. They cover almost all of Wales, Scotland, Northern Ireland and parts of the north, north-west and south-west of England.

The areas are divided into three categories – special development areas, development areas and intermediate areas. The greatest degree of assistance is in the special development areas where, in addition to a fixed grant of £1,500 for every job created (£1,000 in development areas), there are generous rent relief grants which can mean that a firm can pay no rent at all for up to seven years. Similar rent relief grants are available on a sliding scale in the development and intermediate areas.

For an overseas firm the bureau can provide a central point from which to start its investigations. Advice is available on the legal requirements for setting up a business in the country. The bureau can advise on technical points such as details of the system of leasing of offices, local taxes such as rates levied on office premises, and the various permissions required for building, extensions to buildings, and so on.

Once a firm from abroad has made a decision to locate in Britain, the general services available from the bureau will be exactly the same as those extended to home clients. Within Britain the bureau offers an information and advisory service, quite free of charge, to firms wishing to relocate. Advice is necessarily completely confidential and impartial and the needs of individual clients are carefully assessed before details of possible locations are offered.

For all firms, economy plays a major part in any decision to relocate, and rates and rents form a major share in financial calculations. The bureau keeps a register of office accommodation available and sites under construction throughout the country, together with details of rents asked.

Willis Faber and Dumas building at Ipswich (architects; Foster Associates; photographer, John Donat).

Office rents vary considerably in different parts of the country and a visit to the bureau can save a great deal of time, effort and expense in sifting economic advantages of one location against another. Rents in central London, for example, can be as much as 10 times higher than those asked in some provincial centres. A firm which, through the nature of its business, cannot locate far from the services of the City can still find that rents in some of the inner boroughs of London or in the suburban areas a short distance away will offer substantial savings. Many firms who need to have a central office in London or a provincial city for the hub of their business have found a satisfactory answer in moving a part of their operation, such as an accounts section for example, to less costly premises in another area.

The bureau keeps detailed information on over 160 towns and cities all over the country and can advise clients on housing and new house prices, educational and recreational facilities and communications links in many areas.

With over 2000 former clients on its books, it is often possible for the bureau to arrange for firms considering an area to visit a firm which has relocated in the area. Many firms are quite willing to pass on their first-hand experience in this way and can often be very helpful to a newcomer trying to assess the pros and cons of a possible location.

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The right base

Peter Macadam, chairman of BAT Industries, Britain's third largest company, outlines the thinking behind his company's recent reappraisal of their location and explains why they decided to stay put.

Two years ago, BAT Industries undertook a thorough and objective study of various European countries in a search for a possible headquarters and base as an alternative to the one it had maintained in Britain since 1902.

Throughout its history, BAT has been a world company with manufacturing plants and trading links all over the globe. Of the 250 000 people employed today, half are in North and South America, and there are as many in Asia and Africa as in the UK. BAT operations in the US, West Germany and Brazil are all more substantial than those in Britain.

So we have never held the view that because BAT started in Britain it should stay in Britain. But, following our research, BAT can say with conviction that it is based in Britain not because it looked right in 1902, but because it still looks right in the 1970s.

The investigation showed that the advantages for basing a multinational company in Britain far outweigh the disadvantages. It seems that the UK is capable of solving most of its problems in the longer term, but many of the benefits offered spring from attributes which have taken many generations to assimilate.

It should be possible to halt and reverse the increasing trend towards bureaucracy in the UK government and some of the state-owned industries. But it is more important that Britain offers political stability. Members of its government and other political leaders have a wide range of experience, contacts and understanding of world situations which spring from a long history of involvement; first, with the Empire countries, then with the Commonwealth and, more recently, with the EEC. Allied with this is a special relationship with the United States.

The government is supported by a civil service of a very high calibre – at least at senior levels – and of universally recognised standards of morality.

That said, we had to face the fact that Britain is going through a depressing period when many people, including businessmen, seem to have lost some of their dynamism. In far too many offices work is done in a routine and unhurried manner and it is often difficult to get anything done if it is out of the ordinary or out of normal working hours.

Some unions, unlike those in America, do not always seem to understand that wealth needs to be created before the proceeds can be divided and spent. Nor do they seem to appreciate the importance of profits to the national prosperity.

In our view, there were signs of a levelling downwards which has been damaging to Britain. In this context there is the penal taxation of the highly-paid. Companies find it very difficult to reward senior executives adequately as a result.

However, there are indications that this situation will change and there is every reason to suspect that the position in other countries will not always be as relatively satisfactory as it is today.

> "Following our research, BAT can say with conviction that it is based in Britain not because it looked right in 1902, but because it still looks right in the 1970s."

On the positive side, investment by foreign companies is welcomed and encouraged by the British government. Half the major American groups have subsidiaries in Britain already, a fact that is recognised by those engaged in work on the government's Industrial Strategy programme at the National Economic Development Office. Special care is being taken to make sure that the multinational companies have a chance to put their views about the way government policies might be shaped to help manufacturing industry improve its performance.

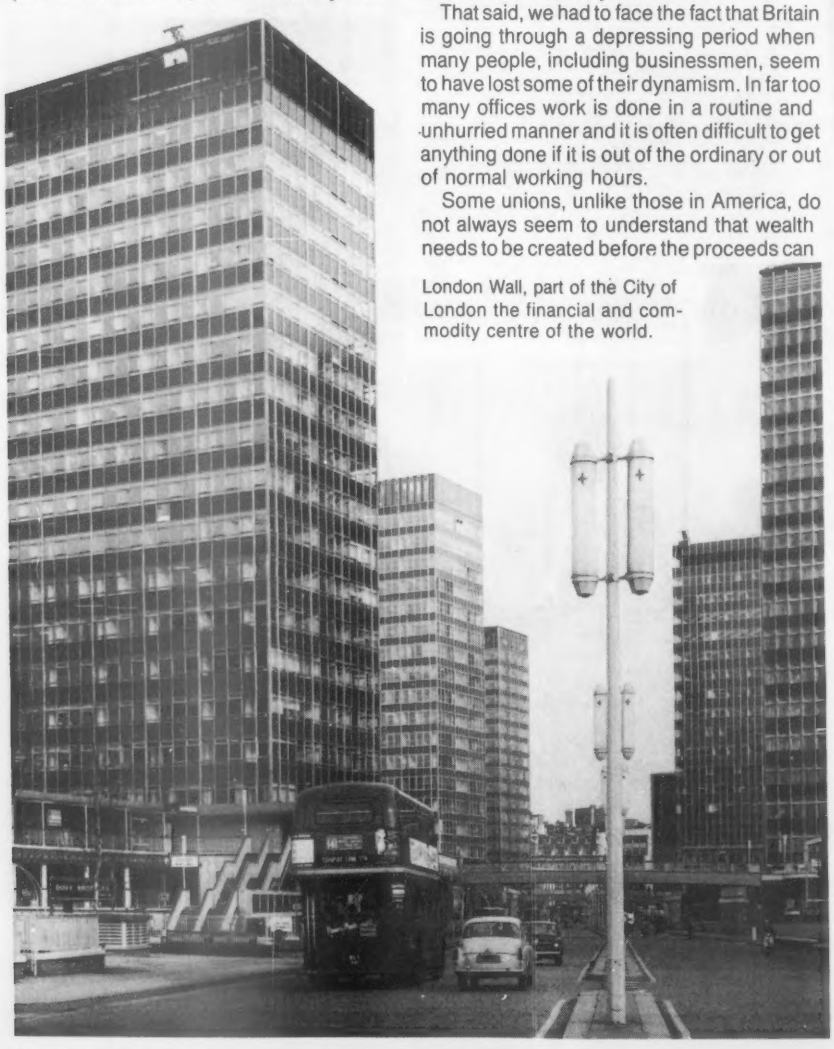
There is certainly no discrimination between British and foreign companies when the government offers financial assistance to industry.

Britain has a long experience of trade and industry but the country's trading position in the world league has slipped in recent years. Positive attempts are being made to reverse that trend from a base which is still relatively strong. Britain remains the fifth-largest exporter of manufactured goods in the world. At the present rate of consumption there are coal reserves for 300 years and enough North Sea oil for at least 15 years.

One British characteristic is that people have a tendency to dwell on the country's shortcomings while hardly ever mentioning the qualities which make it such a good place in which to live. The talk seems always to be about industrial disputes – although these are fewer than is generally believed, if one studies the statistics – rather than the fact that the vast majority of people are friendly, phlegmatic, pragmatic and have a priceless sense of humour.

And they speak English, the language of North America, Australia, New Zealand and elsewhere; the second or alternative language in many countries – India, Indonesia, China and much of Africa for example – and the commercial and scientific language of much of the world.

The quality of life in Britain is helped by the climate. The weather changes frequently but in general is remarkably kind. Nowhere in Britain is more than 90 miles from the sea. Most cities are close to areas of great natural beauty. There are 9000 medieval or pre-Reformation churches and more than 20 cathedral cities. London and large towns have theatres, concert halls and cinemas.



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Communications are good in Britain. There are 1300 miles of toll-free motorway, fast trains and internal airways. Most important European centres can be reached in two hours by air. So, not surprisingly, Heathrow airport, London, is one of the world's busiest. There is a national telex system that is entirely automatic and 98 per cent of international telephone calls are dialled direct.

All kinds of high-level professional and commercial services are available in Britain including management consultancy, law, accountancy, advertising, printing and so on. There are nearly half a million students at any one time receiving higher education at the 44 universities and 30 polytechnics, many of which offer management studies. Scientific research in the universities and other institutions is of a very high order, while medical and educational services are still both well regarded despite their widely publicised problems.

Then Britain also offers the City of London, a first-class financial centre by any standard. It has one of the world's two most efficient stock exchanges and is closely linked to the other one in New York. About 11 per cent of the world's invisible trade – banking, insurance, merchandising, shipping, tourism, overseas investment – is accounted for by Britain. That is more than any other country apart from the United States.

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Standards of probity in the City of London are exceptional. Perhaps this has something to do with the fact that it is still small enough for its chief operators to know one another personally.

So, while the problems besetting the UK today – be they social, political or financial – cannot lightly be dismissed, there are pressures on government to correct the faults and there are increasing signs that changes for the better will take place.

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County of West Midlands

New to the office

Alan Williams talks to Raymond O'Brien, Merseyside County Council's new chief executive, about inner area redevelopment and the prospects for the expansion of office employment, both on Merseyside and elsewhere.

Why have Liverpool and the other major British cities switched from encouraging development in new towns and on greenfield sites to a policy of revitalisation for the inner city areas?

There are, I think, two elements to our new policy. The first is that we are all part of a national pattern and it was the national policy after the last war which led to the development of new towns. Liverpool, like other major cities, reacted to that policy and helped move both industry and housing out to the new towns. Indeed, I think it is fair to say that no other conurbation has been affected to the same extent as Merseyside by decentralisation policy; within our immediate area we have seen the development of Skelmersdale, Runcorn and Warrington new towns, and the first murmurings of the development of the huge Central Lancashire new town. And even though we have seen the sometimes adverse effects on the City, I am bound to say that even in retrospect I think the policy we pursued for many years was in many respects the right one, except perhaps that where there has been a major impact upon conurbations in the sense of surrendering population and job opportunities, the impact has not been quantified to the extent that it perhaps should have been.

Now national policy has changed. There is a new awareness of the social and economic problems of inner city areas and we in Merseyside are of course not alone in suffering from these problems, although it is possibly sharpest here for some of the reasons that I have mentioned. We welcome the change in national policy and the new emphasis on inner city problems, and although I personally have some reservations, we see the development of the new partnership committees as vehicles for speedy action.

The second element that should be stressed is the emergence of the county council as a new focal point and pressure point. Five years ago we did not exist and whatever you may feel about the problems and opportunities of Merseyside, the fact is that until the new Merseyside council was created as an entity four years ago, there was nobody who represented or spoke for Merseyside as a whole. Now we are recognised as the economic development authority and we are determined to give the inner areas our support, to make the necessary decisions rapidly and to generate the right atmosphere for the provision of advance offices and other infrastructure appropriate to inner area redevelopment.

Did the initiative for inner area redevelopment come from the areas themselves or central government?

In a sense, both. The initiative came from central government in the sense that it produced the white papers on inner city policies, but equally. I like to feel that this came about largely as a result of pressure from the cities and regions concerned. This is, of course, as it should be – the policies of the nation have changed dramatically in response to representations from MPs, administrators and others.

One hears the criticism abroad that already too much of Britain is a development area, that we are trying to develop too many areas at once. Isn't inner area redevelopment simply more of the new town policy in a different guise?

No. You have to remember that we live on a relatively crowded island, and that brings both the problems of living together and the opportunities in terms of manpower resource. But most importantly, it also brings the problem of knowing exactly what physical development we want and where we can put it to the greatest advantage and the least financial and environmental cost. We have not had the options of some other countries, and we have in the past looked to the creation of new towns to solve our problems. What we are now saying is that, whilst the New Town Policy solved many of our problems in the 1950s and 1960s, the effects on the inner areas of the major cities have been extremely dramatic, and that, perhaps, we have been slow to appreciate the fact and to do some-

Head office of Merseyside and North Wales Electricity Board

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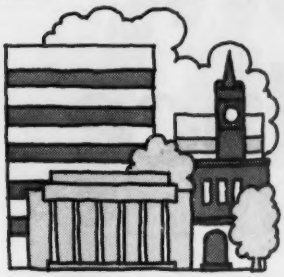

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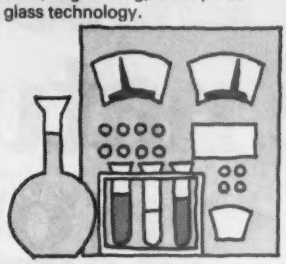

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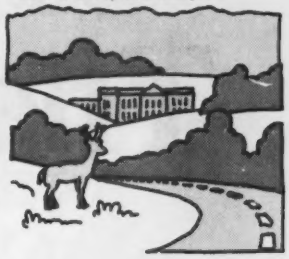

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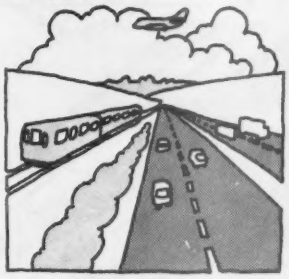

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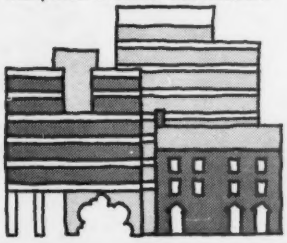

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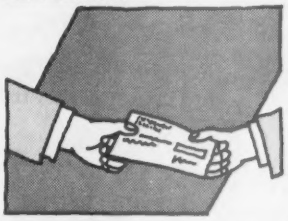

Selective Assistance for all types of industrial service and office developments.
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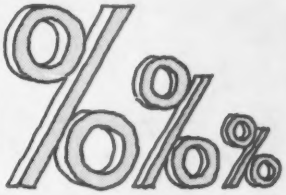

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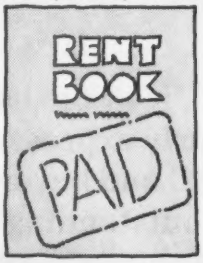

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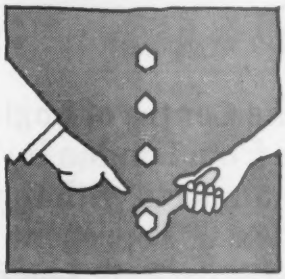

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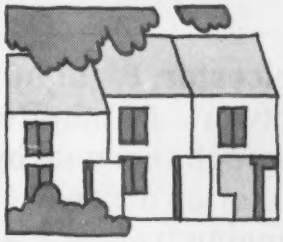

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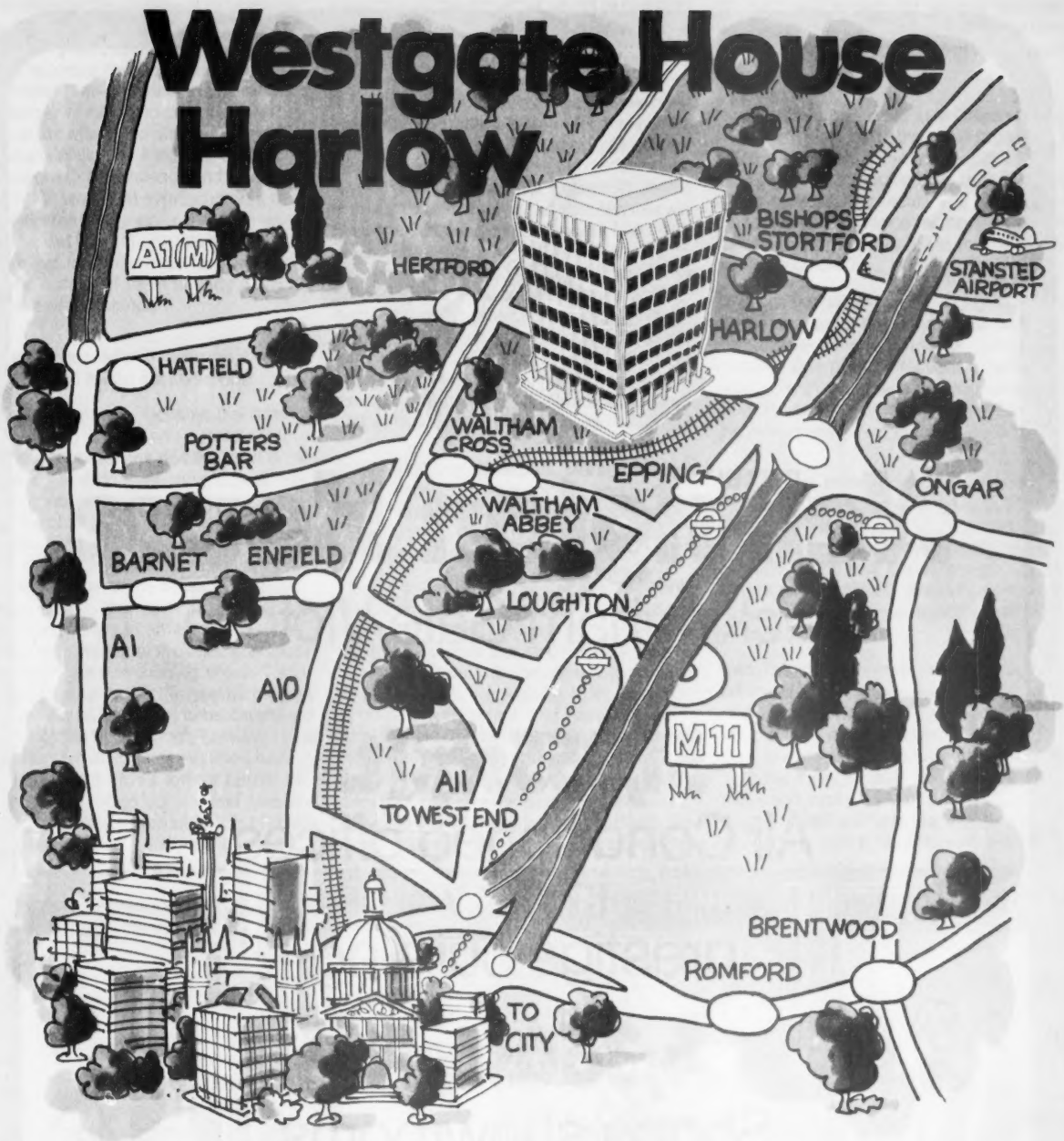

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thing about it. It is certainly fair to argue that, in trying to change the emphasis dramatically back to the inner city areas, it is possible to create other ghetto areas. It is possible, for instance, to argue that, in looking closely at the inner area problems here in Liverpool we are in danger of failing to take sufficient account of the effects on other areas such as Birkenhead, Wallasey, Kirkby or Bootle. There has got to be a balance and it is one of my fears that we might overfocus on a relatively small area of territory to the detriment of the others. But I don't think that the inner city areas are yet more development areas in a new guise – most of them already enjoy some form of assistance.

In practical terms, what exactly will the inner city partnership mean for Liverpool?

I very much hope it will enable the county council, the city council and central government to co-ordinate their policies in all of the areas which add up to economic development and economic growth, providing a vehicle for channelling funds into the inner city areas. It is relatively easy to produce specific grants for particular activities, but much harder to oversee these in a co-ordinated way so that you can achieve balanced development in an area, as well as adequate recognition of the effects of those decisions on the surrounding areas. This is the main opportunity that the new partnership brings. We have, however, to be careful we don't fall into the trap of simply creating a new bureaucracy which creates yet another decision process and thus a further barrier to actually getting things done. I feel sure that the secretary of state is aware of this problem and will ensure that it does not happen.

Do you see inner area redevelopment encouraging the growth of an office complex here in Liverpool?

Yes, I do. I think we have perhaps been slow in seeking to attract new office development to Liverpool in the past, especially as we have been a service industry centre for many years and thus have a tremendous pool of expertise and skill in the administration, clerical and related areas. Liverpool is a splendid centre in the commercial sense, and the fact that we have missed the boat for the last few years makes us all the more determined to seize the opportunities before us. The future looks promising, and I think we shall see both a demand for and provision of offices in this area. We were, for instance, delighted to see that central government is proposing to bring a large number of civil service jobs to the new Exchange Station site, and we hope that will be the forerunner of many more.

But why is it that, in the past, Merseyside has been unable to attract service and public administration jobs on the same scale as, say, the north east? Is it simply because there have not been the offices here?

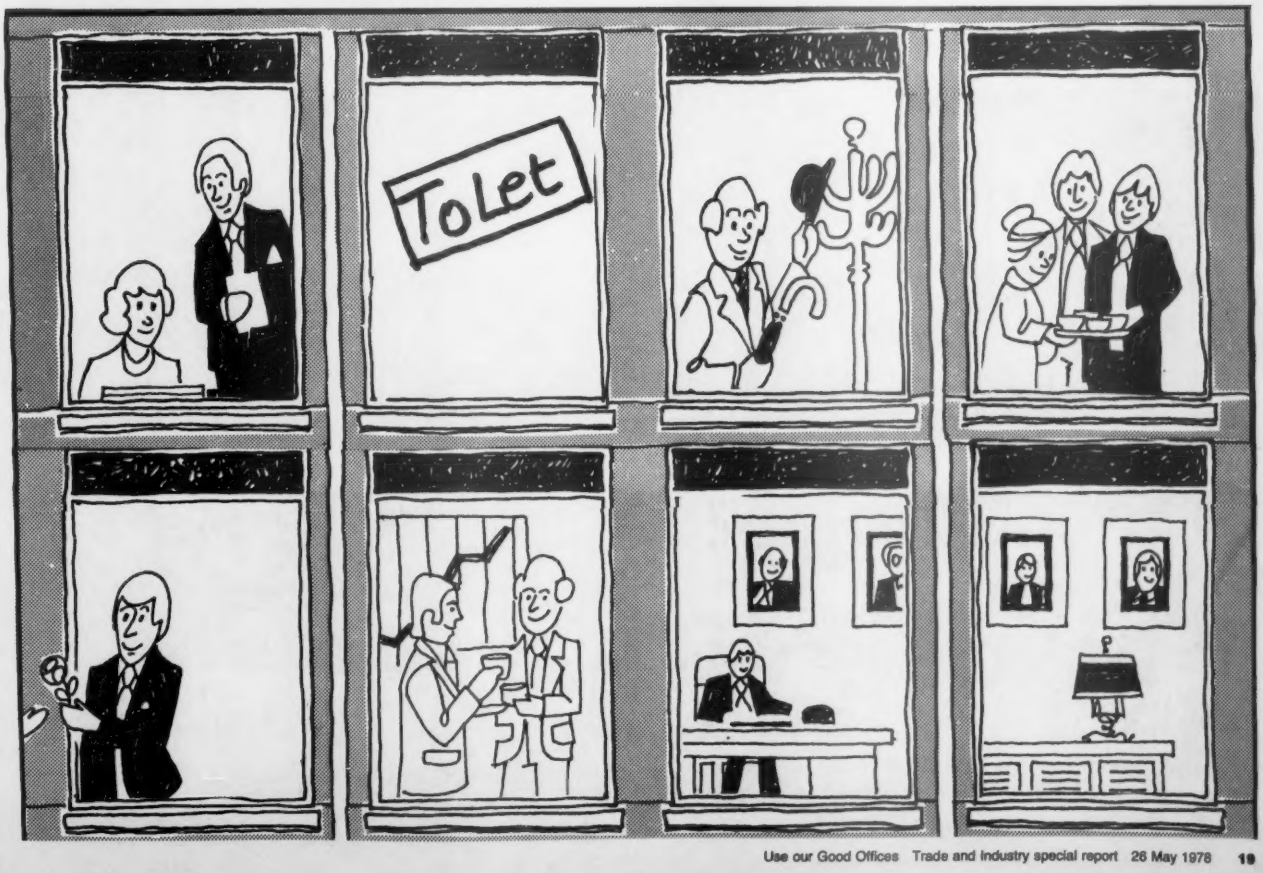
I'm not sure that I agree that the admittedly disappointing results in the past have been due to our inability to attract. As I said earlier, we are conscious that in the past we have tended to concentrate on attracting industrial development, quite possibly to the detriment of office development, and have instead tended to rely in that field on the work of such organisations as the Location of Offices Bureau to steer office development in the direction of Merseyside. In fact, however, very little has come our way except to Bootle, so we intend to set out our stall specifically to attract new offices. In the past we have simply not tried hard enough for various reasons, and although we have seen the light at a fairly late stage in the day, I think we have a good story to tell.

I suspect that the Location of Offices Bureau would say that one of the main problems of office re-location is that many office employers look for speculatively built, ready to occupy offices. Historically you have been in the forefront of advance factory building, but has any thought been given to building advance offices?

There has certainly been a very great deal of discussion about the principle of advance office building in the last few months, that is certainly one of the directions in which we shall go with this new set of economic initiatives. Personally, I think advance office building is very important indeed.

With its new underground railways and easy access to the motorway network, Merseyside now has good physical links with both its hinterland and the remainder of Britain, but are you happy that the centre of Liverpool can provide sufficient ancillary services to support a large concentration of office employment?

Yes, I am quite confident that we can provide all the ancillary support services that anyone might want. Remember that, in addition to the road and rail network which you rightly mention, Merseyside is an extremely large port with the most modern container terminal in the world, and we also have a major airport. Furthermore, we have just decided, with the agreement of the Secretary of State for



Raymond O'Brien.

Transport, to go ahead with the construction of a major inner ring road to help traffic through, round, in, under and over the city!

In terms of direct office services, I made the point earlier that we are a tremendous commercial centre, with a fine tradition in the world of commerce, as opposed to the industrial sphere. We are already a tremendous service industry centre, with the major banks, insurance and finance houses all established here, plus one of the largest universities in the country.

Are there any particular types of office employment you are particularly seeking to attract to Merseyside?

Clearly, those who tend to move in the commercial as distinct from the industrial sector of business, those whose work is akin to the world of banking, insurance or finance generally, the sort of people who will find a lot of fellow feeling on Merseyside. And we are particularly interested in attracting headquarter offices as opposed to branch offices.

What special incentives can you offer a prospective office developer interested in Merseyside?

Most of the incentives which we have to offer are of course available to organisations moving to any special development area – such things as government finance, rent relief, grants for jobs created and employees moved, and so on. But here on Merseyside the council has a policy of looking at each case to see if it can help purely on the merits of the individual case. With our developing policy for advance office building and the withdrawal of rate charges on empty offices, plus our work with district councils to ensure as much help as possible on the housing front, I think we can offer a fair amount of 'special assistance'! Just recently we had a group of people who are thinking of moving from London visit one of the sites here in Liverpool. They came up with their union and staff representatives and the county council took them around, showed them what was here, the sort of housing which is available, the health and social facilities and the opportunities for recreation in and around Merseyside. Our efforts seemed to be well received, and a number of people went away with markedly more favourable attitudes.

Is it not something of a paradox that, at a time when you are suffering massive unemployment in the traditional engineering and heavy industrial sectors, you are now talking about office development in the inner areas?

No, because this new initiative is in addition to our other efforts to regenerate Merseyside as a whole, and we shall certainly not be easing the pressure on the other, traditional industrial fronts, although of course many of our unemployed people, especially the younger ones, are looking as much for office and clerical work as industrial work. And we have retraining programmes for the unskilled workers who have been overtaken by modernisation and change in our port-related industries. As I said earlier, we see office employment as an area we have neglected in the past, and we intend to try harder in the future, but it is nevertheless only but a part of the great spectrum of activity here on Merseyside.

Finally, if you had to encapsulate the attractions of Merseyside, perhaps for an overseas company wishing to set up a large office somewhere in Britain for a European operation, in a few sentences what would they be?

Excitement and Action are the keywords. Our major resource on Merseyside is our people, and despite the usually exaggerated stories you may hear about industrial disputes, the vast majority of firms on Merseyside have had no labour problems whatsoever for many years. Merseyside has a great deal to offer, and we think it is about time we stopped being kicked about by the media and started to take some initiatives. That's where the excitement and action comes in; anyone who wants to join will be most welcome!

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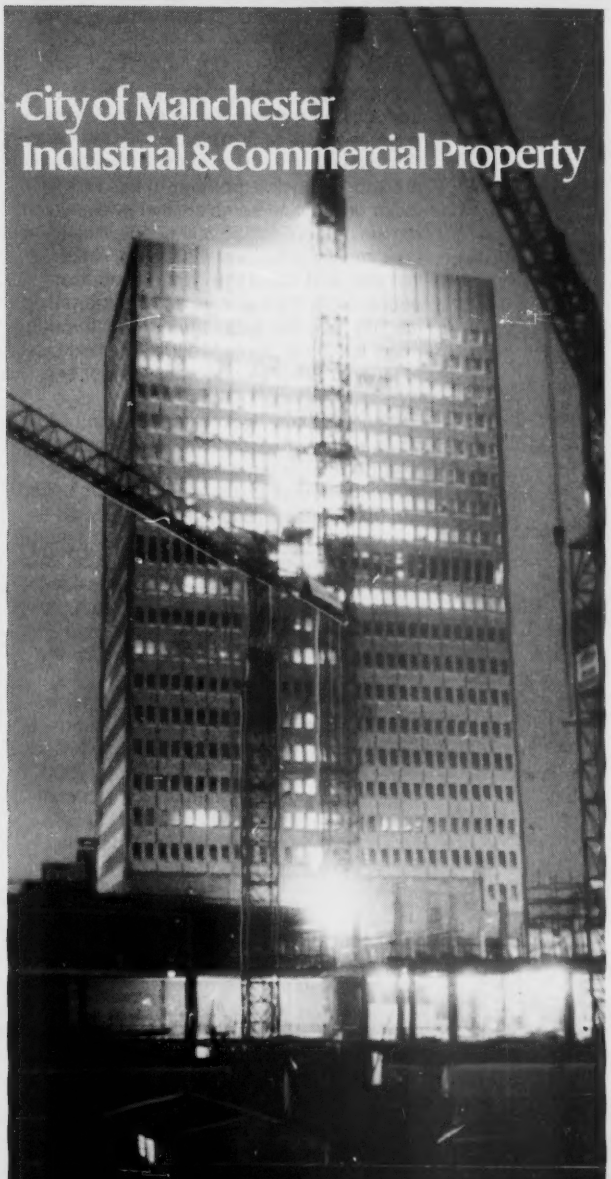

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Down in the docklands something's stirring

C. N. Beard, director of the Docklands Development Team, describes the objectives of the London docklands strategic plan

In the last few years, London's docklands have been a fit subject for political and journalistic hyperbole – 'the greatest opportunity for London since the Great Fire'; 'the largest urban renewal project in Europe'; '5000 acres of derelict land' (or 'virgin land', depending on the point being made!). But what is the real nature of the opportunity which docklands presents, and what is being done to seize it?

The area defined as docklands for planning and administrative purposes is some 8½ square miles (5500 acres), of which about half is expected to be available for redevelopment – a sizeable area for a development project, but not vast in relation to the 600 000 acres of Greater London. What makes it of vital importance to the future of London is its location; what makes its development particularly difficult – but interesting – is its structural complexity.

Docklands starts in the very heart of the capital, just below Tower Bridge, and extends 12 miles eastwards, downstream as far as Barking Creek. It covers, obviously, the area occupied by the upper docks of the Port of London, but it also includes extensive areas occupied or recently released by the Gas Corporation, and marshlands originally earmarked for dock expansion. It includes five major docks, and some smaller ones, which remain operational; 55 000 people live in the area, mostly in houses or flats built since the last war, and about the same number of people work there in a variety of enterprises ranging from the docks themselves through major industrial plants like the Tate and Lyle refinery at Silvertown to small one or two-man enterprises.

Office developments near Reading bridge, overlooking the Thames.

Picture opposite: Another dockland – at Portsmouth, with modern offices situated near the berth of HMS Victory.

Within this area, we reckon that about 1000 acres are available for development now, that a further 500 acres will become available within the course of the next five years or so, and that perhaps 1200 acres more could be redeveloped within the next 20 years if there are further major dock closures. In total, this amounts to about half the land in docklands; the other half is occupied, in the main, by homes and businesses which can, and indeed should, remain undisturbed for the foreseeable future.

Acknowledging the constraints imposed by existing development and the uncertainties about the timing and scale of future land releases, the prospect of more than 2500 acres of land close to central London becoming available does justify a good deal of excitement and hyperbole. No other major city of the western world has had such an opportunity since the immediate aftermath of the war.

Though comparisons can obviously be drawn with the post-war New Towns, in the last resort attempts to regard docklands as though it were closely analogous to a new town must fail. It is not a virgin, green field site upon which the planner's fancy can gambol freely; it is not even a coherent and largely undeveloped zone into which an established city can expand, as has happened at Northampton or Peterborough. It is an integral part of the five London boroughs which contain it and of east London as a whole; its redevelopment must be seen in the context of the problems and resources of east London, and must be relevant to the needs of the wider area.

The Docklands Joint Committee, appointed by the Greater London Council and the five docklands boroughs (Greenwich, Lewisham, Newham, Southwark and Tower Hamlets) to plan and co-ordinate the redevelopment of the area, sees its overall objective in the London docklands strategic plan 'To use the opportunity provided by large areas of London's dockland becoming available, to redress the housing, social, environmental, employment, economic and communications deficiencies of the docklands area and the parent boroughs, and thereby, to provide the freedom for similar improvement throughout east and inner London.'

This objective has far-reaching implications. It requires, for example, that the strategic plan should be not merely a land use plan but should indicate how development might be encouraged, how land and buildings

might be used, and the conditions in which people might live and work. It requires that the development should blend into the surrounding urban areas physically, socially and economically and that what was done should respect the lifestyle of the people living there now; and it requires that projects and proposals for development should be judged according to whether or not they enhance the conditions of life in east London and London generally and not adopted merely on grounds of prestige or fashion, or because of a precedent established in different circumstances in other cities and countries.

Space does not permit a full account of the economic, social and environmental problems of docklands and east London and of the ways in which the Strategic Plan addresses them. The problems of inner urban areas have received a good deal of attention in recent years – partly, no doubt, as a result of work done in docklands – and are becoming broadly familiar. The fundamental problem which faced docklands was the decline in its economy, due to the closure or running down of the Upper Docks and of activities dependent upon them, and the general decline in manufacturing activity in east London. This paralleled a national decline in manufacturing employment, but the effect in east London was far more catastrophic; between 1971 and 1973 manufacturing employment fell at seven times the national rate. The reasons for this decline are complex, but at the risk of over-simplification, one can say that too many of the firms in east London were occupying old and obsolete premises which did not allow them room for expansion or for the efficient utilisation of modern equipment and techniques, so that the stronger firms moved elsewhere to better environments, whilst the weaker ones simply went out of business.

Irvine, one of Scotland's new towns, with a recent development linked to the railway station.

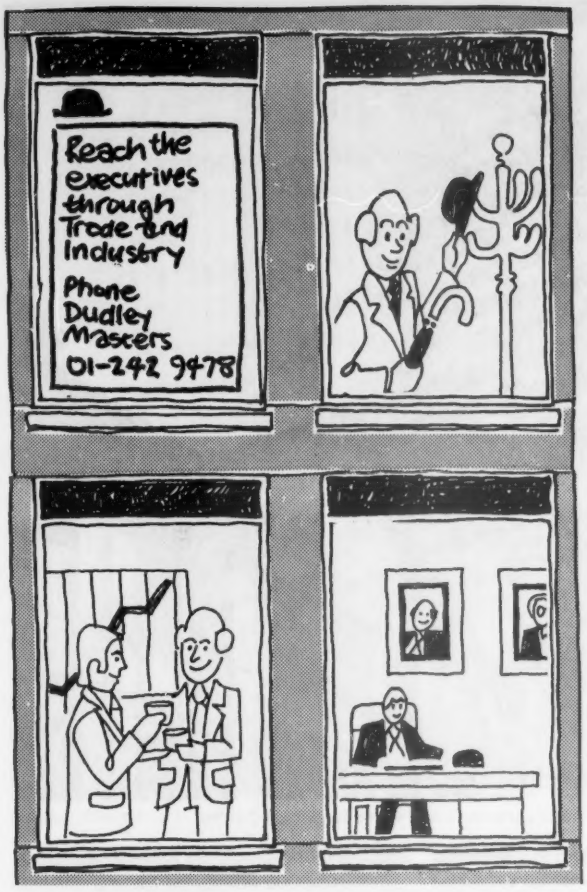
Faced with this situation, it would have been tempting to seek a new economic base for docklands, for example, by a massive investment in office facilities. The temptation was resisted, for a variety of reasons. The Greater London development plan had identified preferred locations for offices outside central London, including Gardiners Corner, Stratford, Barking, Peckham, Lewisham, Woolwich and Thamesmead; a major office centre in docklands would merely compete with these established centres, to the detriment of all. Moreover, the traditions of the area and the skills of the resident workforce point to an industrially-based economy; and, most important of all, the opportunity exists in docklands to create the conditions in which modern industry can flourish and the immense latent advantages of London as a centre for manufacturing can be realised.

London did not grow to be the country's main manufacturing centre by accident, and the factors which made it so largely remain – its nodal position on national and international transport networks, its vast resident population providing a diversely skilled workforce, and the huge local market it provides. These factors will reassert their influence if local conditions can be improved. That means that industry must be given the space required for modern factories, good access to the regional and national road networks for the easy movement of goods, and efficient and reliable public transport for easy access by the labour force. All this can be provided in docklands, with the added bonus of excellent facilities for rail and water freight movement for those who need or can use them.

The London docklands strategic plan therefore proposes the creation of four large industrial and commercial zones, where firms will have the space and the facilities needed by modern enterprises, located where they can take full advantage of the existing transport infrastructure and the major improvements which are proposed in the plan. The zones at Beckton, in Poplar/Silvertown/North Woolwich and in the Greenwich peninsula will be largely industrial; in the Surrey Docks the main feature would be the proposed International Trade Mart employing some 12 000 people, which would be accompanied by a 20 acre industrial estate. There will also be a somewhat smaller office, commercial and industrial zone in Wapping.

The key to unlocking the potential of docklands is transport. There are to be immediate improvements to the two existing passenger railways, London Transport's East London line and British Rail's North Woolwich line while in the slightly longer term a new Underground line, the Jubilee Line, is proposed to link the main docklands areas with each other and with central London to the west and Woolwich and Thamesmead to the east. These rail services will be complemented by bus services linking docklands with the main shopping and office centres to north and south.

Several major road schemes are proposed. Northern and southern relief roads will by-pass existing bottlenecks and the east



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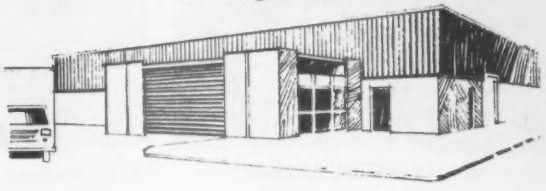

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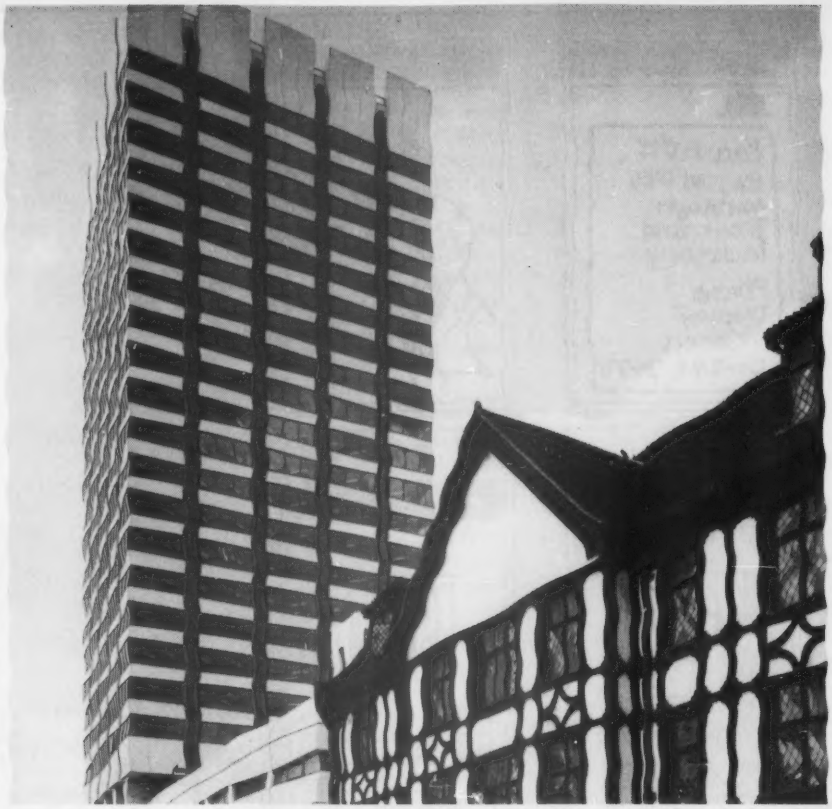

London Weekend Television headquarters, South Bank Television Centre.

London river crossing to give a new route across the river and to link docklands more firmly to the main road system of Greater London and to the national motorways. In addition to these major schemes, which are obviously not free from controversy and will take some years to carry out if they are finally approved, the plan proposes immediate improvements to existing roads, both within and outside docklands, and the construction of distributor roads in the main areas of development.

New housing will be constructed for between 50 000 and 60 000 people. Dwellings intended for families with children will be houses with gardens and there will also be low rise flats for one or two person households. Shops, schools and other community facilities will be provided at district and local centres sited to take advantage of the public transport facilities. About 350 acres of new public parks and playing fields will be provided, in addition to the 94 acres which already exist and to playing fields for the new schools. The open spaces will be arranged so as to link to each other and to the river front which will be opened up for recreation.

Much of this is already happening. The joint committee's constituent authorities already own, or are in process of acquiring, most of the land needed for the first phases of development. Drainage schemes are under construction in the Beckton Marshes and improvements to the railways and the roads are already in hand or about to start.

At the London industrial park, a 65-acre industrial estate in Beckton, 100 000 sq ft of new factory and warehouse estate has recently been completed and preparatory

Norgas House, headquarters of the Northern Gas Board, at Killingworth New Town on the outskirts of Newcastle

London International Press Centre in Shoe Lane.

Telephone House, Leeds.

works for the next phases are in progress. Plans to provide some 300 000 sq ft of advance factory space in or around docklands will be carried out in the course of the next year, with more to follow. Over 240 dwellings have been completed since the strategic plan was produced, another 1100 are under construction, and a further 10 000 more are targeted to start within the next five years. Detailed planning for shopping, schools and community facilities is going ahead and construction work is in progress or about to start on some of them.

All this ferment of activity has had its effect in a resurgence of commercial confidence in docklands. Since the strategic plan was produced the joint committee has received and approved over 100 planning applications for industrial or commercial development. Many were from existing firms seeking to carry out improvements or extensions, while others were from new firms moving in and adapting premises to their particular needs. Both categories are indicative of the faith industry operating in and around docklands now has in the future of the area, justifying investment in better facilities.

Willis Faber and Dumas building at Ipswich (*architects, Foster Associates; photographer,* John Donat).

Banking on Stratford

Maureen Miller looks at Morgan Guaranty's move to Stratford, East London

Morgan House, an impressive 14-storey office block, quietly dominates the otherwise bustling Stratford Centre in east London. Morgan Guaranty Trust Company of New York, an international corporate bank, completed its phased moves into this 103 000 sq ft tower block in March 1977. The building is the largest in the Stratford Centre, a comprehensive modern redevelopment of Stratford's former business centre, occupying an area of over 260 000 sq ft. Besides Morgan House, it includes over 90 shops, a street market, and two smaller office blocks.

Morgan Guaranty has been represented in London since 1897. The City office still occupies its original site in Lombard Street. By the mid-1960s, as a result of very substantial growth, the bank had become fragmented and was occupying several offices all over the City. 'With the prospect of considerable further growth,' Peter Dale, vice-president and assistant general manager, told me, 'we took a long look at what the alternatives were.'

One alternative – initiating a major office development in the City – was quickly ruled out as uneconomic and impractical, as the exercise of attempting to find and cost a suitable site later confirmed. 'But,' said Mr Dale, 'given that three-quarters of our staff are in operations and administration, it seemed appropriate to consider moving the majority of them out of the City to a somewhat less expensive area.'

The bank's choice of area was, however, limited by the need to have very effective physical and technical communications between its City office and the new location. The other main criteria were sufficient space to house the administrative and support staff under one roof, and a reduction in overheads. Given that staff costs were unlikely to change, Morgan took the view that its objectives could be better attained in an area where rent and rates were lower.

After a detailed study of the bank's long-term needs, five areas around London were selected and the task of finding a suitable building from what was currently available or under construction began. Interestingly, the Stratford Centre block was not one of the five buildings originally suggested by Morgan's estate agents. 'They didn't think it was us,' says Dale. 'But given that the majority of our staff live to the east and north-east of London and the need to be within about half an hour from the City, Stratford seemed to be the logical choice.'

Stratford, in fact, fitted Morgan's brief perfectly. Just five miles down the A11 from the City, it offers first-class rail, tube and bus links both with the City and with the areas in which most of its staff already lived. The company's dependence on complex telecommunications systems also made such an inner-area location preferable to one further out of London. The 103 000 sq ft office block provides adequate space to bring together the bank's operating, financial and administrative divisions, thus increasing its efficiency and overall performance.

One direct result of the reduced occupancy costs in the new location is the very high standard of working conditions and better facilities that the bank can now provide for its staff. 'Also,' says Dale, 'with more square feet per person, you can plan and purpose build, instead of squeezing people into every available corner.' The building, virtually a shell on acquisition, has been fully air conditioned, centrally heated and fitted out to suit the bank's specific needs. The open-plan offices have been designed, decorated and equipped to a very high standard. Staff facilities, almost impossible in the City because of lack of space, include a 200-seat self-service restaurant and attractive club rooms.

The move also provided an opportunity for the installation of the most up-to-date communications and computer systems – a particular advantage, according to Peter Dale, 'because our business can only survive on good communications'. The equipment includes an IBM 3750 telephone switching system and a document facsimile transmission system linking Morgan House with the bank's City and West End offices. Add to this an underground vault and a separate and secure computer suite and you might say that Morgan House has been tailor-made for Morgan Guaranty.

Right from the word go, the bank recognised the crucial importance of involving the staff, particularly in view of the time lapse between the formal announcement in March 1975 and the first stage of the actual move in October 1976. 'We felt throughout,' says Dale, 'that one of the most important aspects of the entire move was to keep everyone in touch with what was going on, partly because 18 months is a long time to maintain enthusiasm and interest.' An illustrated brochure was produced that described the reasons behind the move and introduced the staff to Stratford and its shops, restaurants,

Big Ben is just visible to the right of the Palace of Westminster viewed from the west. Shell occupies the tall office tower on the right between Westminster and Waterloo bridges.

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theatre and other facilities. Producing the brochure enabled the bank to make itself known to the local community and a number of fruitful relations were established. A series of displays kept the staff up to date with building developments over the entire preparation period and a week before they moved, each member of staff was given a detailed guide to the building and facilities to familiarise them in advance with its layout.

As a result of this positive approach to staff involvement, the relocation has been achieved with a minimum of staff disruption. Morgan moved over 600 people and has lost fewer than 30 directly as a result of the relocation. Staff morale has remained high.

Dale claims that Morgan Guaranty's move to Stratford has met all its objectives, and has been a relatively painless exercise in every respect. A significant planning effort by the bank, combined with full co-operation and assistance from the local authority and the whole spectrum of services and organisations it had to deal with, resulted in very few initial problems. Now, a year after the move, Morgan feels that its choice of Stratford as a location has been completely justified. Peter Dale sums it up succinctly: 'An area like this, which is in need of additional income, is just ideal for this type of operation, given the huge amounts of space available and the very effective communications, and I personally think it a great shame that decisions are not being taken to move more people and organisations into some of the less prestigious areas of London.'

Master move

When Barclaycard needed more space for its Masterloan scheme, it looked north, to Stockton. Maureen Miller reports

Barclaycard, because of its particular nature could, in theory, locate its operation almost anywhere, according to Brian Mitchell, manager of Barclaycard's regional office in Stockton-on-Tees. In practice, however, there were two major constraints governing the choice of location – the availability of labour and good road and rail links – and both factors had influenced the initial choice of Northampton for the original Barclaycard Centre.

But the starting point for the development of Barclaycard's regional operations, of which the move to Stockton was a part, has to be the early 1970s, when the rapid growth of business began to put pressure on the Northampton Centre. With a fast-growing new town population, good communications with London, and the existence of the bank's clearing department locally, it had seemed an ideal choice. But ironically, the new town development, with its industrial estates in the suburbs, close to the homes of the workers, proved to be a powerful counter attraction for staff, and Barclaycard began to experience recruitment problems. The rapid growth of business in 1973 brought these problems to a head by increasing pressure on existing staff, premises and machinery. The remedy was redispersal of some of the Northampton Centre's functions to regional locations.

Barclaycard took advice on suitable locations, including unemployment figures, activity rates, and recruitment prospects. Apart from reasonably priced modern accommodation and good communications, the main requirement was staff. It therefore seemed appropriate to select areas of high unemployment which would provide existing pockets of under-utilised labour.

Four areas were chosen – Liverpool, Birmingham, Leeds and Middlesbrough. The Stockton office was added to the list in 1974 to ease the growing pressure on the Middlesbrough office which had taken over two additional functions – customer relations and late recovery – from the still hard-pressed Northampton centre. New premises and staff were urgently required to ease the overcrowding of the 17 500 sq ft unit in Middlesbrough's Cleveland Centre.

A three-storey office block at Stockton was selected and occupied in August 1974. This had been rejected earlier in preference for the Cleveland Centre office because of its distance from public transport, but because it was now to handle higher level functions including masterloan, credit review and late recovery, it was thought more likely that staff would have their own transport.

Staff recruitment in Middlesbrough/Stockton has been very successful. Vacancies are almost always over-subscribed and the quality of applicants high. 'We have been delighted with the quality of recruits at all levels,' says Mitchell.

Since a high proportion of Barclaycard's staff are clerical, the north-east, which has the lowest national proportion of working married women, a high rate of female unemployment, and a pool of unemployed school-leavers, has provided a plentiful supply of labour. 'We have almost drained this year's pool of school-leavers,' says Mitchell. Their qualifications are generally higher than the minimum requirement and many of them have been eligible for promotion after their first year. The lack of opportunity elsewhere in the region also resulted in a high standard of applicant for the more senior clerical posts which called for people with experience of accounts and credit control. Many of those who applied were long overdue for promotion in their previous jobs. Some of these posts were also filled by promotion of existing staff from Middlesbrough and Stockton.

The variations in the daily fluctuations in the work load are well covered by the flexible use of part-time ancillary workers, usually married women. Many women have also been drawn from other kinds of employment by the attraction of office work and the favourable company conditions.

High regional unemployment and a lack of opportunity have combined to produce a very stable workforce, a particular advantage in view of the time needed to train new recruits. Nor has there been any difficulty in staff replacement; Brian Mitchell receives a constant stream of unsolicited applications, which are put on file so that vacancies can be filled as they arise.

The relocation of existing staff from Northampton was not a major element in the move to Stockton, with only about a dozen people transferring, mostly at management level.

At present the Stockton office handles the accounts for nearly 1 million cardholders. However, the operation has proved so successful that more work is being moved there in the autumn. The current staff of about 350 people is, therefore, being gradually expanded to about 450 by the end of the year, making Stockton Barclaycard's largest Centre next to Northampton.

Barclaycard's successful move to Stockton is an excellent example of the mutual benefit that relocation can bring to both the company and the region into which it moves. The employer benefits from the supply of good quality staff, reasonably priced accommodation, and efficient communications, while the region gains from the stimulus to its economic and social development.

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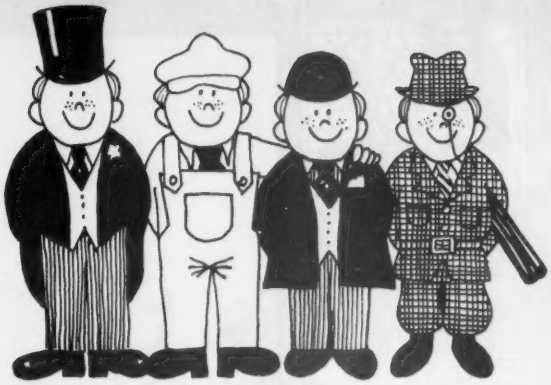

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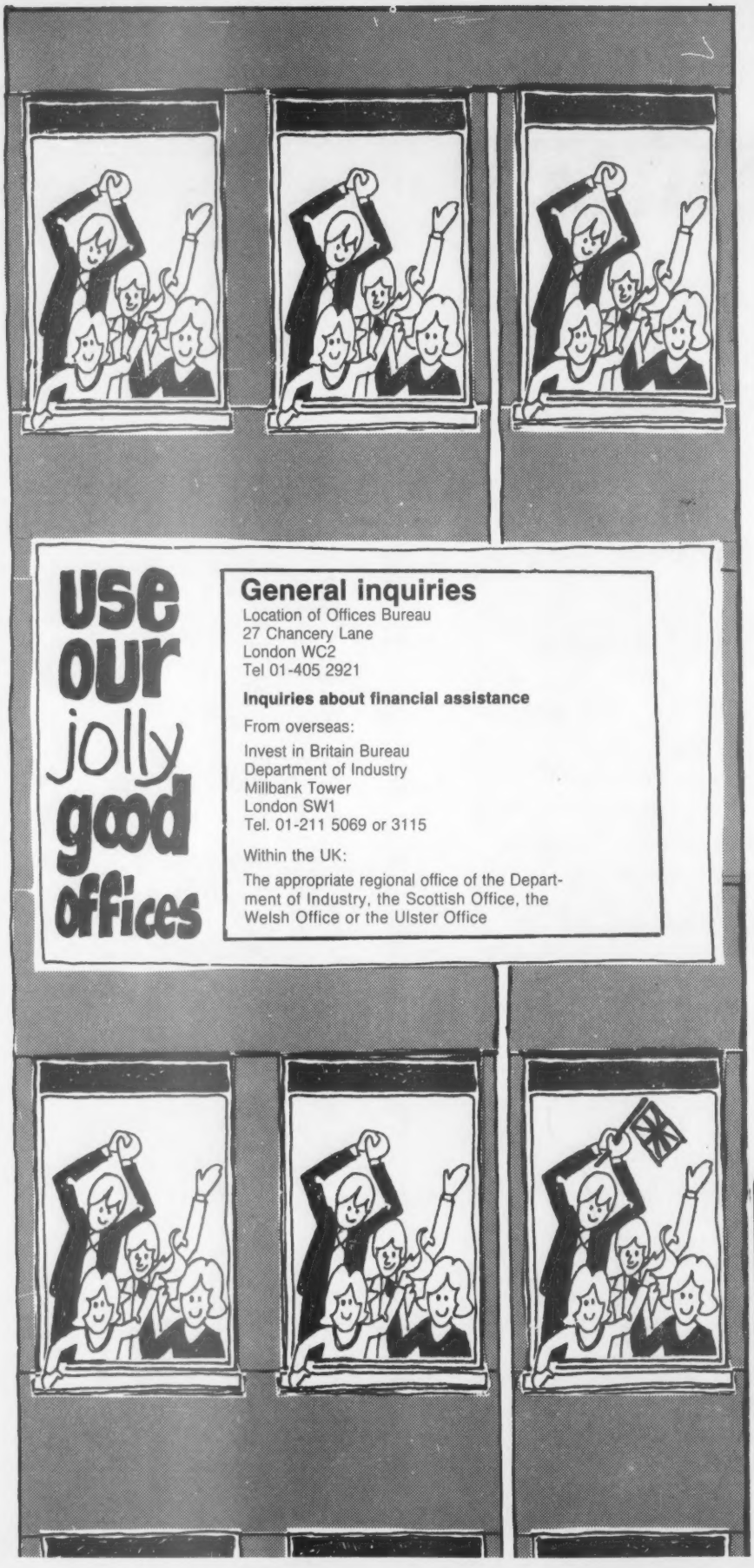

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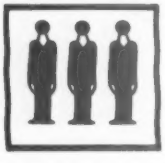

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The government proposes Mr Ross as Sir Raymond Bell's successor, but it is for the board of governors to appoint the vice-president.

Mr Ross is at present deputy secretary in the central policy review staff in the Cabinet Office.

NCB gets £65m ECSC loan

Approval has been given to a £65 million loan to help the National Coal Board partially finance a new mine at Selby, Yorkshire.

The loan will be given under article 54 of the European Coal and Steel Community treaty by the European commission.

It will contribute partially to the financing of the Selby £550 million project and will cover planned capital expenditure for the period to 31 March 1980. Capital expenditure subsequent to that date will be assisted by a further loan.

On completion, the Selby mine will be one of the largest and most productive pits within the community. The commission views the sinking of new pits such as Selby as essential to the achievement of community energy policy which is aimed at reducing fuel imports.

The loan will be disbursed in phase with the progress on the project and the terms of each instalment will depend upon market conditions at the time of disbursement.

Anti-dumping probe into US high-tenacity yarns

Information has been received by the European commission indicating that dumping is being practised or that bounties or subsidies are being granted in respect of imports of polyamide and polyester high tenacity yarns for tyres, machinery and plant – CCT heading no ex 51.01 A. Nimexe codes 51.01.07 and 21. – originating in the United States of America and that this is causing injury to a community industry.

In conjunction with the member states, the commission has accordingly started examination of the matter at community level in accordance with council regulation (EEC) 459/68 of 5 April 1968 on protection against dumping or the granting of bounties or subsidies by countries which are not members of the European Economic Community, as amended by regulation (EEC) 2011/73 and (EEC) 1411/77.

Interested parties may, by 16 June 1978, make known their views in writing to the Commission of the European Communities, External Relations Directorate General, Rue de la Loi 200, 1049 Bruxelles, Telex: Comeurbru 21877; and copied to the Department of Trade's anti-dumping unit: General Division 1, Department of Trade, Kingsgate House, 66/74 Victoria Street, London SW1E 6SJ.

The commission will hear parties directly concerned who so request when making known their views to the commission, provided they can show that they have an interest sufficient to entitle them to express their views more fully.

New EEC documents

This list of EEC documents was deposited in the House of Commons in the seven days to 18 May 1978 (commission reference numbers, where appropriate, are given in parentheses). The documents are available for consultation at the European Commission Communities Information Office, 20 Kensington Palace Gardens, London W8 4QQ.

EEC draft instruments

R/1038/78 (COM 139)
Amended proposal for a council regulation on the European Co-operation Grouping.

R/1078/78 (COM 176)
Amendments to the proposal for a council regulation amending regulation No. 136/66/EEC on the establishment of a common organisation of the market in oils and fats.

R/1080/78 (COM 169)
Proposal for a council regulation (EEC) on a common measure for forestry in certain dry Mediterranean zones of the community.

Consultative documents

R/986/78 (COM 110)
Commission report on the results of invitations to tender on the resources of the 1st, 2nd, 3rd and 4th European development funds in 1977.

R/999/78 (COM 186)
Proposal for transfers of appropriations between chapters

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within the budget estimates for the Court of Auditors for the financial year 1978.
R/674/78 (COM 113)
Draft decision of the representatives of the governments of the member states of the European Coal and Steel Community, meeting within the council, allocating to the community supplementary revenues for 1978.
R/1023/78 (COM 189)
First list of non-automatic carry-overs from the financial year 1977 to the financial year 1978 (article 6 section 3 of the financial regulation of 21st December 1977).
R/1104/78
Maximum rate of increase in relation to expenditure of the same type to be incurred during the current year.

Beef premiums to continue

Following the agriculture ministers' council from 8 to 12 May, the UK's dual support system of beef premiums underpinned by intervention will continue for the 1978/79 marketing year.

The ceiling on the amount of premium payable in any week will be increased to 6.20 pence per live kilogramme.

As indicated by John Silkin, Minister of Agriculture, Fisheries and Food in the commons on the outcome of the council meeting, the whole package of measures is still subject to the lifting of a formal Italian reserve. Council regulation (EEC) no. 909/78 states that the 1978/79 marketing year for beef and veal will commence on 22 May 1978. Unless the council decides otherwise, the 1979/80 marketing year will begin on 2 April 1979.

The Ministry of Agriculture, Fisheries and Food has issued a list of the common agricultural prices for each commodity for 1978/79 which were agreed upon by the council of agriculture ministers on 12 May. Copies may be obtained from MAFF, Whitehall Place, London SW1A 2HH, tel. 01-839 7711.

Two anti-dumping probes closed

On 28 December 1977 the European commission announced the opening of an anti-dumping investigation concerning imports of hole-punching machines originating in Japan and on 11 March announced an investigation into allegedly dumped imports of resin from Sweden.

In the course of both investigations the exporters gave undertakings which have satisfied the commission that the introduction of protective measures is unnecessary at present.

Both cases have accordingly been terminated.

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations and decisions which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

Oils, fats and oilseeds. Regulation (EEC) 851/78 amending regulation (EEC) 2114/71 on the subsidy for oilseeds *(Official Journal* l 116, 28 April 1978).

Regulation (EEC) 852/78 amending regulation (EEC) 1569/72 laying down special measures for colza and rape seed, and repealing regulation (EEC) 2713/72 (*Official Journal* L 116, 28 April 1978).

Pigmeat. Regulation (EEC) 857/78 establishing the list of pigmeat products eligible for the advance fixing of export refunds (*Official Journal* L 116, 28 April 1978).

Regulation (EEC) 858/78 laying down special detailed rules of application of the system of certificates for the advance fixing of the refund in the pigmeat sector and amending regulation (EEC) 193/75 (*Offical Journal* L 116, 28 April 1978).

Hops. Regulation (EEC) 890/78 laying down detailed rules for the certification of hops (*Official Journal* L 117, 29 April 1978).

Regulation (EEC) 891/78 amending the annex to regulation (EEC) 1517/77 fixing the list of the various groups of hop varieties cultivated in the community (*Official Journal* L 117, 29 April 1978).

Processed agricultural products. Regulation (EEC) 870/78 determining the amounts of the variable components and additional duties applicable from 1 May to 31 July 1978 inclusive, on the importation into the community of goods covered by regulation (EEC) 1059/69 (*Official Journal* L 118, 29 April 1978).

Beef and veal. Regulation (EEC) 909/78 extending the marketing year for beef and veal (*Official Journal* L 117, 29 April 1978).

Milk and milk products. Regulation (EEC) 910/78 extending the 1977/78 milk year (*Official Journal* L 117, 29 April 1978).

Fruit and vegetables. Regulation (EEC) 918/78 amending regulation (EEC) 10/65/EEC laying down common quality standards for garlic (*Official Journal* L 119, 3 May 1978).

Regulation (EEC) 919/78 applying quality class III to certain fruit for the 1978/79 marketing year. (*Official Journal* L 119, 3 May 1978).

Regulation (EEC) 937/78 adopting protective measures with regard to the importation into France of aubergines originating in Spain (*Official Journal* L 120, 4 May 1978).

Seeds and forest reproductive material. The *Official Journal* L 120, 4 May 1978 contains the text of decision 78/415/EEC authorising the member states to restrict the marketing of forest reproductive material produced in Austria.

The *Official Journal* L 124, 12 May 1978 contains the text of decision 78/430/EEC authorising the United Kingdom to permit to be certified as 'certified seed' seeds which have been entered for certification as 'basic seed'.

Harmonisation of legislation

Proprietary medicinal products. The *Official Journal* L123, 11 May 1978 contains the text of directive 78/420/EEC amending second directive 75/319/EEC on the approximation of provisions laid down by law, regulation or administrative action relating to proprietary medicinal products.

Copies of the *Official Journal* may be obtained from H.M. Stationery Office, price £1.20 plus postage. Further information, Department of Health and Social Security, tel. 01-638 6020 ext. 319.

Correction

Gas volume meters. The telephone number quoted for the Gas Standards Branch of the Department of Energy in the notice on page 264 of *Trade and Industry*, 5 May 1978, should read 'Leicester 78 5354'.

Imports from non-member states

The *Official Journal* L116, 28 April 1978 contains the texts of the following decisions:

Decision 78/403/EEC authorising the United Kingdom not to apply community treatment to gloves, mittens and mitts, knitted or crocheted, not elastic or rubberised, coated with vinyl, falling within heading ex 60.02 of the common customs tariff, originating in South Korea and in free circulation in the other member states.

Decision 78/404/EEC: authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to women's, girls' and infants' woven and knitted or crocheted dresses, of wool, cotton or man-made textile fibres, falling within heading ex 60.05 of the common customs tariff, originating in Taiwan and in free circulation in the other member states.

Decision 78/405/EEC authorising France not to apply community treatment to bleached or unbleached cotton fabric and woven fabrics of man-made fibres (discontinuous or waste), falling within heading ex 55.09 or subheading ex 56.07 A of the common customs tariff, originating in Thailand and in free circulation in the other member states.

Decision 78/406/EEC authorising France not to apply community treatment to tents, falling within heading 62.04 of the common customs tariff, originating in South Korea and in free circulation in the other member states.

Decision 78/407/EEC authorising France not to apply community treatment to garments, clothing accessories and umbrellas, falling within heading ex 61.01, ex 61.02, 61.03 or 66.01 of the common customs tariff, originating in the People's Republic of China and in free circulation in the other member states.

Decision 78/408/EEC authorising France not to apply community treatment to garments, falling within heading 61.01, 61.02 or 61.03 of the common customs tariff, originating in Hungary and in free circulation in the other member states.

Decision 78/409/EEC authorising France not to apply community treatment to tableware and other articles of a kind commonly used for domestic and toilet purposes, of porcelain or china or of other kinds of pottery, falling within heading 69.11 or subheading 69.12 C or D of the common customs tariff, originating in the People's Republic of China and in free circulation in the other member states.

Overseas trade news

Britain's Mexican exhibition draws 80 exhibitors

Nearly 80 companies have indicated that they will be taking part in the British industrial exhibition, Britain's largest overseas trade promotional venture in 1978, which will be held in Mexico City from 8 to 17 November.

Among the organisations who have reserved large stands are the Machine Tool Trades Association, GEC, Bentley Engineering, Rolls-Royce Motors, Rolls-Royce Ltd, British Metro, the Associated British Machine Tool Manufacturers Ltd, Davy International, The Northern Engineering Industries, and the Nationalised Industries Overseas Group.

The Duke of Kent, vice-chairman of the British Overseas Trade Board, which is sponsoring the exhibition with the support of the economic affairs committee of Canning House, will attend the exhibition.

Progress so far

Reviewing the progress of preparations so far, Norman Cox, British ambassador in Mexico, said in London on 18 May that the purpose of the exhibition was to demonstrate the UK's interest in the continuing process of Mexican industrialisation. 'The idea,' he said, 'is that the exhibition should concentrate on the Mexican government's own key sectors, and I very much hope that we shall get a strong response from British firms interested in the Mexican market.'

Continuing confidence

The timing of the exhibition reflects Britain's continuing confidence for the development and expansion of trade and co-operation between Britain and Mexico. Key sectors for British exports have been identified as: steel-making plant; machine tools for metal and woodworking; petrochemical process engineering technology and plant; machinery for the manufacture of products based on petroleum derivatives; offshore oil exploration; textile (natural and synthetic) machinery; agriculture – production, processing, packing; hospital scientific and technical equipment; fertilisers; electricity generation and transmission switchgear; transport, particularly rail and port development; fishing (deep sea) and fish processing; minerals and mining; merchant banking and consultancy related to any of the above.

As well as Mexican businessmen, the exhibition is expected to attract visitors from the Caribbean and Central and South America.

New regulations on import of compressed acetylene

Proposals which will allow the import of acetylene to be controlled in the same way as other explosives – by licence issued by the Health and Safety Executive – were issued on 16 May. At present the import of acetylene is prohibited except under a procedure requiring an order signed by the Secretary of State for Employment.

Fees would be determined in the same way as those applying to explosives generally. For the importation of acetylene these would be in the region of £14 under the proposals.

The Health and Safety Executive is asking for comments on the draft regulations from all those interested.

Copies of the draft regulations can be obtained from: Mr N. P. W. Watson, HSD A2, Health and Safety Executive, Baynards House, 1 Chepstow Place, London W2 4TF.

Review of customs warehousing procedures

Customs and Excise is initiating a review of customs warehousing procedures, as the application of the common customs tariff from 1 January 1978 provides a suitable opportunity to consider more flexible arrangements for customs warehouse approvals, control and documentation.

No changes are proposed at this date in the management, control and administration of warehouses approved for excise purposes or concurrently approved for goods subject to both customs and excise duties.

Customs proposals have been set out in an explanatory paper prepared for discussion by the joint customs consultative committee on which trade organisations with customs interest are represented. Any interested trade body or association not represented may obtain a copy of the discussion paper from HM Customs and Excise International Customs Division F, Room 324, King's Beam House Mark Lane, London EC3R 7HE, tel. 01-626 1515 ext. 2534.

Birmingham chamber organises Middle East courses

Birminghan Chamber of Industry and Commerce is holding a one-day Middle East orientation course at the chamber on 1 June.

The topics covered by the one-day course include the historical geography of the Middle and Near East to the beginning of the twentieth century; Islam and Muhammad; the Middle and Near East in this century; and Arab attitudes, courtesies and greetings. Time will be allowed for discussion.

The next five-day course, which includes instruction in colloquial Arabic and a more in-depth investigation of Arab history and culture, is scheduled for 26 to 30 June and there will be further courses throughout the year.

Full details, together with an application form for either the five-day or the one-day courses, are available from Graham Ashmore, Middle East Secretary, Birmingham Chamber of Industry and Commerce, tel. 021-454 6171 ext. 203.

Austria to introduce new lorry tax

From 1 July international haulage companies will find their vehicles being taxed while in Austria if a draft law is finally approved by the Austrian legislature. It is expected that foreign vehicles will be taxed on entering Austria, and drivers will be asked to pay in cash.

The Department of Transport advises companies to ensure that drivers are aware of the new tax and that they carry with them sufficient cash to cover likely charges, especially if drivers are leaving the UK in May or June for destinations in eastern Europe or the Middle East when they could find the new tax in operation when they return through Austria.

The law at present provides for a tax calculated at the rate of 0.25 Austrian schilling for each tonne of permitted payload capacity, multiplied by the number of kilometres travelled in Austria. The maximum payment in any one calendar month will be as follows:

- ☐ vehicles with a maximum permissible payload of up to 8 tonnes – 100 schillings per tonne;
- ☐ vehicles with a greater payload capacity – 200 schillings per tonne.

The department understands that the tax of AS0.25 per tonne-km will apply whether vehicles are wholly or partly laden, but that no charge will be made for distance covered without any load.

Drivers will need to declare the payload capacity of their vehicles and the distance they expect to travel with a load.

Drivers will be able to prove permitted payload capacity by deducting the unladen weight of their vehicle shown on the vehicle excise (road tax) disc from the gross train or vehicle weight shown on the Department of Transport or manufacturer's plate. When vehicles leave Austria, customs officials will check actual distance travelled against that estimated, and adjust the tax charge accordingly.

What these might be for single journeys are illustrated by the following examples, which the department stresses are for guidance only and must not be taken as authorised by the

Austrian authorities. All are based on a 20 tonne maximum permissible payload: Salzburg to Spielfield, 1,650 schillings; Salzburg to Villach, 660 schillings; Kufstein to Brenner, 550 schillings; Salzburg to Vienna, 1,350 schillings.

Because changes in the tax law are still possible before it becomes operative, the department advises companies to check with their trade associations before leaving the UK.

The Austrian government has said that the new tax is necessary if road users are to make a proper contribution to road costs. When first published the tax proposals were for foreign vehicles to pay four times the rates now proposed. The reduction was made following protests by the EEC commission on behalf of all member states.

Japan: a growing market for oceanic and offshore goods

Japan is a big and growing market for British equipment. This is the key conclusion of a report, 'The Japanese Market for Oceanic and Offshore Equipment', published on 17 May by the British Overseas Trade Board.

The market potential is illustrated by the expected rate of growth – 30 per cent this year, 25 per cent in 1979 and an annual 15 per cent in future years.

The report emphasises the acceptability of British products – especially those incorporating high technology – in Japan. 'The UK has a better sales record in the sectors of sophisticated products, such as surveying and research equipment, and she should continue to do well in these sectors. In fact, the UK may do better than before because the Japanese market is growing and the current yen/pound exchange rate gives the UK more of an advantage than previously,' says the report.

British products in which the Japanese are particularly interested include equipment for research and surveying, developing ocean resources, using ocean space, developing ocean energy, for offshore civil engineering, anti-pollution, diving and security. Specific details are given of the Sakhalin oil project – which offers good opportunities for British suppliers.

The report also pinpoints the need for British companies to promote their products far more actively through participation in trade fairs, publicity, advertisements and invitations to specialist teams from Japan to visit Britain. The requirement for aggressive selling by British firms is underlined by the report's finding that British manufacturers of oceanic and offshore equipment are far less well-known to the Japanese than manufacturers from the United States, France and West Germany.

Factual material in the report includes details of the size and future trends of the Japanese market, opportunities for specific types of British equipment, names of Japanese companies involved in oceanic and offshore equipment and a map showing the major projects undertaken by Japan.

The report is available from the British Overseas Trade Board's Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU, price £35 post free. The report was prepared for the board by Peat, Marwick, Mitchell and Co, Tokyo. It supersedes a report on the same subject published in September 1974.

Commercial officer in UK

S. N. Simms, second secretary (commercial) in Santiago, Chile, since October 1976 is expected to be in this country in August when he will be available for discussions.

Because commercial officers often have only limited time at their disposal it may not always be possible to fit everyone in. Where it is possible, firms are reminded that the Export Services and Promotions Division of the Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU, is in close touch with all overseas commercial officers and can very often supply advice, or information that applicants hoped to obtain at the interview.

Outside London, the regional offices of the Department of Industry, Welsh and Scottish Offices and the Department of Commerce, Belfast, can also help.

British firms and organisations who wish to meet the officer are asked to write for an appointment, giving full details of the specific export problem and commodities involved.

Firms in Northern Ireland should contact the Export Branch of the Department of Commerce, Belfast; those in Wales the Welsh Office, Cardiff, and for Scotland the Scottish Office, Glasgow. For firms in the eastern region and the London and south-eastern region (and any organisation in the other regions who would prefer or be prepared if necessary to meet the officer in London) should write to Tours Section, Department of Trade, 50 Ludgate Hill, London EC4M 7HU. For all other regions firms should contact the appropriate Department of Industry regional office (exports).

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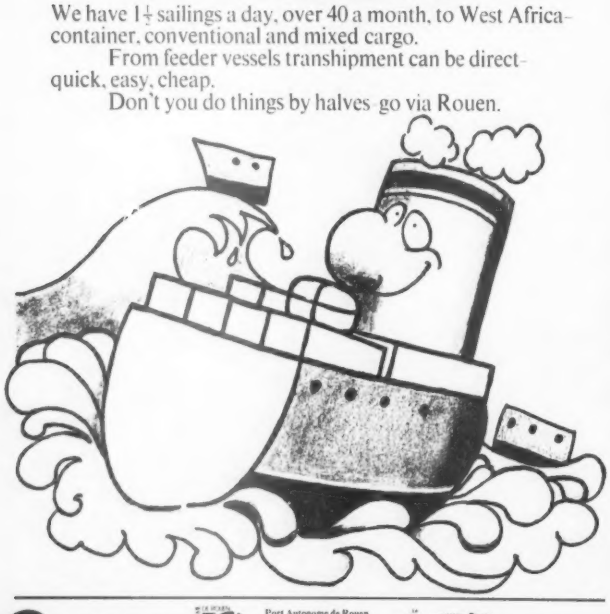

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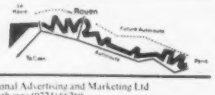

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Chicago store stages promotion of British consumer goods

Sir Peter Vanneck, Lord Mayor of London, will be opening an autumn promotion of British consumer goods at Marshall Field, a leading department store in Chicago. Under the theme 'the City of London', the promotion will run from 25 September to 14 October.

The store's first ever national promotion was their British promotion held in the autumn of 1977. The successful outcome of that event led Marshall Field to plan an even-larger British occasion this year with the full support of the British Overseas Trade Board.

The increased business generated by this special sales effort, for which the store is making very substantial additional purchases, will benefit many British manufacturers.

The event is being staged with loans of special exhibits from the city and the decor, worked out by Marshall Field's display department, will create the British atmosphere and set the scene.

British firms wishing to take part in the promotion should contact: P. Le Pelly, Marshall Field's London Office, Westmoreland House, 127 Regent Street, London W1.

Bookings up at US book fair

A total of 54 companies are being supported by the British Overseas Trade Board at the annual convention and exhibition of the American Booksellers Association which opens in Atlanta tomorrow (27 May). This compares with 30 companies last year and 14 in the first joint venture to the show in 1976.

The group is sponsored by the Book Development Council.

Almost all the companies who exhibited at the show in 1977 are returning this year. Among items on display are facsimile reproductions, books for children from 2 to 16, books on sports and recreational activities, scientific books, military books, educational books and books on various hobbies.

Companies exhibiting at the show for the first time are featuring illustrated books on art and antiques, books on warships and yachts, books about cultural and leisure pursuits, current affairs books, a book of all the known sonnets and poems of William Shakespeare and world guides to archeology and mountaineering.

Five-fold increase in UK exhibitors at Sitev

There was a five-fold increase in the number of British companies at this year's international exhibition for the vehicle industry (Sitev) in Geneva. A total of 78 companies on 34 stands have been taking part in the exhibition which closes today (26 May) – compared to 14 companies in 1977. The joint venture, supported by the British Overseas Trade Board, is sponsored by the Society of Motor Manufacturers and Traders.

Products displayed included solid sponge-rubber components, vehicle air-conditioning systems, seat belts, steering components, shock absorbers, synchromesh rings, clutch and brake cables, fuel tanks, polyurethane bumpers, and car and truck silencer systems.

Poznan pavilion full

All the space in the British pavilion has been taken for the Poznan international technical goods fair which takes place from 11 to 20 June. Over 200 British firms, supported by the British Overseas Trade Board, will be exhibiting this year – the fifteeth anniversary of the fair.

Nearly £3m sales follow French agriculture show

Following the French agricultural week (see *Trade and Industry* 7 April page 20, exhibitors in the British pavilion organised by the British Agricultural Export Council in collaboration with the British Overseas Trade Board achieved record sales of £2,658,000 and inquiries worth a further £12 million from France, Europe and many other countries.

Furniture exports 21 per cent up

Figures released by BFM Exports Ltd (previously the British Furniture Manufacturers' Export Club) show that, in the first quarter of 1978, the value of British furniture exports totalled £58,054,000, compared with £47,865,000 in the same period last year – an increase of 21 per cent.

Give Khartoum a miss this July, businessmen advised

British businessmen are advised to give Khartoum a miss during the fifteenth summit conference of the Organisation of African Unity and its preceding foreign ministers meeting.

The Sudanese authorities have requisitioned all hotel accommodation from 5 to 24 July inclusive and hotel proprietors have been instructed not to accept any reservations from any one not connected with the conference. Also the Sudanese embassy has been instructed not to issue entry visas which would be valid for the conference period, except to participants in the conference.

The British embassy in Khartoum advises that the entry-visa ban will not be applied rigidly and exceptions – for example British subjects employed in the Sudan returning after summer leave – will be allowed. Each case will be considered on its merits, but applications should be submitted as soon as possible.

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Languages and our trading future

Does Britain need linguists? This was the central question posed at (and the title of) a conference in London on 19 May, organised as part of the Export United campaign. Sponsored by the University of Surrey, in association with the British Overseas Trade Board and the Royal Society of Arts, the conference, subtitled, 'Language education and our trading future', considered how the greater use of foreign languages could help Britain sell overseas and what action educationalists and industrialists could take to ensure that Britain's managers were more competent in the use of foreign languages. The main points made by the speakers are summarised below.

One of the government's main objectives, said Leslie Huckfield, Parliamentary Under-Secretary of State for Industry, in his address to the conference, was to reverse the long-term decline in Britain's position as a trading nation. Anything that could help do this was of interest to the government and his department. He was delighted, therefore, to be taking part in the conference which was looking at one factor in the complex of issues that make up successful exporting.

'Not only do we need to improve our language training,' he said, 'but also its relevance to modern life. And nothing is more essential to the life of the UK than a successful export effort.'

Combining language education with other disciplines, so that, for example, law students could be taught French or German law in French or German and Soviet law in Russian was, he felt, an excellent way of broadening the opportunities to students. 'In addition,' he continued, 'the system of spending six months of the course in foreign employment in a kind of management trainee role seems likely to help in producing the kind of graduates well placed to move into industrial and commercial life.'

Future trade pattern

What will be the world trade pattern in the 1990's? Will Britain have the right trained people to pilot our trade and industry through the next 20 years or so? These were the major questions discussed by Jim Wilks, chief executive, British Overseas Trade Board, who stressed the importance of exporters being able to communicate with potential clients in their own language.

'Everyone in the export business knew or should know,' he said,' how important it was to develop good personal relations with overseas clients, potential clients and agents.'

Turning to an analysis of trading patterns Mr Wilks pointed out that in the past British businessmen had been generally able to rely on their overseas contacts to speak English.

'Fifty years ago' he said, 'British trade was concentrated very heavily in our vast Commonwealth and Empire, and much of our non-empire trade was with north America. So there were not many language problems for many of our overseas salesmen because they were selling to other English speakers.'

But the situation today was very different, the most striking feature being the steadily growing importance of western Europe for UK exports and a corresponding decline in the importance of the Commonwealth.

Mr Wilks went out to analyse the export figures:

'In 1950, more than half our exports went to north America and the Commonwealth, broadly the English speaking world. By 1960 substantial changes began to occur, and the percentage of our trade going to the English-speaking world fell to 40 per cent by 1965 and by 1977 that percentage had fallen further still to 26 per cent.

'The oil-exporting countries have become increasingly important. The share of our exports to Opec countries has more than doubled since 1970, and these countries now take more of our exports than does north America (13 per cent goes to the Opec countries, 12 per cent to north America) and it is worth remembering, in the context of our proceedings today, that not all oil exporters are Arabic speaking. In addition to the Middle East we have Venezuela, Nigeria and Indonesia, and others may well join this group.'

In his consideration of expectations for the future, Mr Wilks predicted an increasing concentration in western Europe; the continued importance of the Opec countries, at least into the 1990s; growing opportunities in south-east Asia and possibly Latin America; and as the 'dark horse' – the extraordinary potential of the Chinese market.

He also drew attention to the fact that an increasing amount of export trade was now becoming multinational in the true sense, with the result that a British businessman might find himself fighting for a sub-contract from an Italian partner in a German/Italian consortium for a project in Tunisia financed by the European development fund in Brussels – with the consortium headquarters in Paris.

'Nobody expects the average salesman to speak, all the languages of all the countries he may be interested in,' he said, 'but this sort of multinational business can turn up some very useful opportunities for the marketing man and management at all levels with a grasp of more than one language.

'But even if we make the right goods can we sell them?' asked Mr Wilks. 'Are we teaching, in schools and universities now, the skills that will be needed when the present generations of students will be producing the marketing men who will have to do this job? From what we have heard so far today, one must say that the answer to that is no.'

He pointed out that an analysis of advertisements of managerial and industrial jobs requiring language ability had shown that only a tiny percentage of posts asked for language ability – 5 per cent in marketing executives, under 3 per cent in senior management, under 2 per cent in engineers, and under 1 per cent in sales representatives. It seemed clear that right now industry did not attach a great deal of importance to language ability.

Obviously this lack of a perceived need on industry's part was one reason why the decline in language teaching had not been accompanied by an outcry from industry, and by a demand for a change in direction. But was industry's current perception of its needs on this side actually correct?

'The analysis I have just given of future trends', said Mr Wilks, 'suggests it is not, and another development leads me to think that industry itself is rather ambivalent after all. That development is the growth of the crash course. So on the one hand we see a decline in "traditional" language education in schools and universities, while at the same time there is a growth in the "commercial" language school.'

Mr Wilks felt that perhaps this suggested that industry had recognised a need but had not yet related that need to the changes going on in our educational system, or to the developments that should be taking place in its own recruiting policy.

Mr Wilks concluded that British industry as a whole needed to improve its marketing among the majority of the world's population who did not speak English. Although it was difficult to foresee developments in world trade, two confident predictions for 1990 could be hazarded. First, the market for international trade would grow faster in the non-English-speaking world than it would in the English-speaking world, and secondly, businessmen would still be queuing up for crash courses in foreign languages two weeks before they flew off somewhere to try and sell something. 'And that may well be too little, and too late,' he said.

Mr Wilks ended his address with a rallying call to both industrialists and educationalists in the audience. To the business community – 'I say have you a clear idea of the needs of your company in the language field? Have you taken account in your long-term personnel policy of the likely trends in your business in particular? And is the educational sector sufficiently aware of, and responsive to, your needs?' To the educationalists – 'I say how do your courses relate to the demands of industry?'

Language learning

Disturbing facts about the current state of language education were considered by Nigel Reeves, professor of German, University of Surrey.

At O-level, in the period 1970-76, with the exception of German, languages were either static or declining. At A-level, for the same period, the situation was even more worrying. All languages had declined, some gravely, and only one-sixth of O-level candidates continued to study a language to A-level.

Professor Reeves pointed out that these statistics also revealed the gross imbalance between the languages taught at both levels (French 3½ times more than German, nine times more than Spanish, and 42 times more than Russian). There was a glaring discrepancy between school language provision and commercial reality.

The picture in higher education was somewhat brighter. Overall numbers studying languages at universities in some form had increased (1970: 5 172 to 1977: 6 170 – an increase of 19 per cent). And those combining

languages with other studies had increased from 2941 to 4174, to form 67.6 per cent of total (1970, 59 per cent).

The polytechnics and colleges of further education also represented an area of growth in degree-level language studies, but, the numbers of enrolled students from a national point of view were tiny.

In both types of institution, however, the same weaknesses of the imbalance between languages and between the sexes studying languages was repeated, he said. Last October, in the entire UK, only 122 had entered a Russian honours course, and a derisory 42 an Arabic course, 20 a Chinese course, and 13 a Japanese course. Business studies in this period had grown by 102 per cent, but an analysis of the courses offered by some 81 higher education institutions with a total of 163 courses showed that only nine had a compulsory integrated language element (only four required an industrial training period abroad), while only nine more had languages even as an option.

Further education, clearly a vital area for industry and commerce in any circumstances, presented a more complex and uneven picture, but two trends emerged: a significant increase in interest in the specialist language areas, for example languages for careers like bilingual secretaries and translators; but in more general areas of languages for business as an auxiliary skill, as in the RSA single subject examinations or, significantly, the OND and HND, the figures were ominously depressing.

'The distribution of language teaching efforts at all levels of education bears little relation to commercial needs and realities. Important European trading languages are neglected or even dying. Chinese, Arabic and Japanese are barely represented; language teaching itself is in a state of confusion and good teachers in short supply, and our scientists and engineers are inadequately equipped linguistically,' Professor Reeves concluded.

Languages for the 1980s and 1990s

Turning to the future language needs of the business community, B. P. Pockney, head of the department of linguistic and international studies, University of Surrey, expressed the view that the greater the businessman's ability to hear and speak in the foreign language, the greater would be the opportunities and the ease with which he could sell his goods.

Of course, if he were the only one selling a particular product which the customer desperately needed, then he need bother very little about his language proficiency for the customer would negotiate in English, local agents would appear, and he would agree the contract in sign language if he wished.

But the moment he had to compete against others on delivery dates, costs, product mix, quality, spares, and servicing, then his ability to explain his products in the local language would become crucial. The preparation of technical specifications brochures in the foreign language could also be crucial as could the presence and availability of representatives fluent in the language.

Looking into the future, Mr Pockney said that as far as he could see, English, Arabic, Spanish, Russian, Chinese and Japanese would be important, as well as, of course, French and German for Britain's relations with western Europe.

Language graduates in 1975 from all UK universities

	Men	Women	Total
French studies	271	745	1 016
French and German	126	248	374
German	169	338	507
Hispanic	90	126	216
Russian	56	108	163
Chinese	6	13	19
Oriental, Asian and African	49	47	96
Classical	221	174	395

Source: CSU. The figures for the last published year of 1975

Referring to the number of British graduates in languages (see table) Mr Pockney said: 'These figures reinforce what we already know about the predominance of French. What they also show is that within the broad overall figures there is a very marked preponderance of women graduating in most of these languages. We can note that with classics holding third place in this league table, we are rather more competent to deal and trade with the Greeks and Romans than with anybody else except for our near neighbours in France and Germany. These figures are almost in inverse proportion to the size or economic potential of language areas.'

Equally worrying was what happened to graduates when they left college, said Mr Pockney. 'Of course tradition plays a part. The imbalance between boys and girls taking modern languages is a contributory factor and has a serious effect on the mobility of graduates.'

'It was clear', he added, 'that the world of business and the world of higher education need to establish a dialogue – and a continuing one at that.

'While we should continue to train specialists in literature', he continued, 'and business should continue to find the best future managerial material it can, it would seem a pity if the two aims cannot be brought together for this is an arrangement whereby both sides would find mutual benefit and profit – and let us hope – pleasure as well.'

He went on, 'we should consider whether it is desirable to adopt a national strategy for languages that would have the dual aim of strengthening the teaching of those languages where we have already laid the basis – French and German – but a considerable expansion is needed at all levels and an allied aim of strengthening the teaching of the so-called "minority languages".

'It would also be desirable to consider serious changes in our educational pattern so that we ended this artificial division between the study of language and literature on the one hand and science/technology courses on the other. There is more and more evidence that our engineers – civil, mechanical, electrical – should have a working knowledge of French and German, for many of them are likely to spend part of their working career abroad and they will be at a disadvantage compared with, say, German engineers, most of whom study English, unless we broaden their education.'

Exporters' viewpoints

Total commitment and conviction were essential to any company or individual embarking on an export plan or career, said J. L. Matthews, export director, Colt International Ltd.

Having done all the homework on the potential market, the final key to success lay in the skills and experience of the export executive who would be responsible for a particular market.

'It goes without saying', said Mr Matthews, 'that the executive should have a very thorough understanding and appreciation of the customs and traditions of the country concerned and accept the code of behaviour expected of visitors to that country. We must also make sure he is sufficiently skilled in any language needs relative to that country.'

He stressed that it was wrong to assume that because English was the second language of a country that it would be widely spoken in that country. Even in Scandinavian countries which have to speak English to survive in the world's business community, English was not always easily understood.

Drawing on the successful experience of Colt International, Mr Matthews described the current situation whereby almost half their total business worldwide came from companies in Holland, Belgium, Germany and France. All of these companies had English personnel in relatively senior positions and they were skilled in the local language.

'There is a constant exchange of personnel within the companies which further enhances this language capability', he said.

He pointed out that Colt also had manufacturing licences or distributors in many other parts of the world, all of which had to be serviced by export department personnel in London, who could offer nine languages, including English.

Mr Matthews admitted that Colt had been able to win its biggest single order ever because of the language capability of the export executive concerned.

The importance of languages in the export marketing of consumer goods was further reinforced by Nigel Bennet, regional director, Seagram Vintners International Inc, who gave a view, based on his own experience, of just how vital the command of languages was in exporting consumer goods. Languages had helped him not only in contract negotiating and direct selling but also in a strike.

He emphasised the disadvantages of working through interpreters and the importance of finding out what was really going on.

Further work

In response to an unanimous demand from the conference, the BOTB will now undertake further work to determine the needs of exporting industries for foreign language speakers in collaboration with representatives of industry, other government departments and the educational world.

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842 or 01-215 5879.

Overseas trade exhibitions

Good results in slow buying fair

From Frances Cooleen, British embassy, Copenhagen

Fourty four British firms exhibited in the fourth British Overseas Trade Board joint venture sponsored by the British Furniture Manufacturers Exports Ltd at the fourteenth Scandinavian furniture fair on 3 to 7 May held at the Bella Center in Copenhagen.

Representing a 76 per cent increase on 1977 participation it was the largest-ever British group at the fair utilising the extra space made available to non-Scandinavian exhibitors in the newly constructed and long overdue international hall H.

Sponsored by the Scandinavian furniture manufacturers associations, although the fair first opened its doors to non-Scandinavian exhibitors in 1974, the international section remained insignificant up to 1978 because of space problems.

The British stands on a net area of 1584 m^2 flanked the entrance to, and complete central area of, hall H with an impressive presentation. Stands were attractively dressed and suspended Union-Jack overhead panels strikingly defined the British area. There were 35 other exhibitors in the international section representing 10 countries including West Germany, Belgium, Italy (second to Britain in level of participation), France, the Netherlands, Luxembourg, Switzerland, Liechtenstein, Brazil and Greece.

Modern and traditional

British manufacturers exhibited a range of both modern and traditional furniture, upholstery, bedding and furnishing fabrics displaying a high standard both in quality and design. Thirteen of the companies were seeking representation in Denmark. Eleven of them had negotiable approaches and the remaining unsuccessful two companies proposed using the agency finding service of General Export Services Branch on their return to the UK. Fifty per cent of the British group were disappointed at the low level of buying activity which, according to reports, was a marked feature of both the Danish and Swedish sections reflecting the depressed state of their economies. The official attendance figure for all sections was 14 797 (5812 for Denmark and 8985 for countries outside Denmark) representing a 10 per cent reduction on attendance in 1977. In terms of exhibitor participation it was the largest furniture fair to date with 617 exhibitors, an increase of 67 over last year.

The approximate level of business 'written up' at the event by the British group amounted to £425,000 which was similar to 1977 for 25 exhibitors. Two new exhibitors, who succeeded despite the prevailing trading conditions and were very satisfied with results, were Armitage and Rhodes, with their exhibits of furnishing fabrics which attracted Nigerian, Middle Eastern, Australian and Icelandic visitors to their stand. Kingsley (Art Furniture), who exhibited reproduction cabinets and occasional furniture, received an order for 500 chairs for a hypermarket in Holland. Kingsley's original design for a food trolley had the distinction of being chosen by a leading Danish newspaper to illustrate an item about the Scandinavian furniture fair. Visitors to the British stands, apart from the Scandinavians, were from West Germany, Belgium, The Netherlands, Middle East, Hong Kong, United States, Nigeria, Canada and the Irish Republic.

Buyers on the stand of Wood Bros, furniture exporters, at the Danish furniture fair.

Furniture exports from the UK to Denmark have been increasing significantly in recent years from £2.89 million in 1975, £4.62 million in 1976 and £6.19 million in 1977.

The majority of British exhibitors who plan to return in 1979 view the furniture fair as an important aspect of marketing in Denmark, not only as a means of increasing their sales but effecting consistent exposure for their products and making contact with existing buyers and representatives.

The 1979 furniture fair will be held at the Bella Center from 2 to 6 May.

US expo effective ceramic showcase

From Bill Busby, British consulate-general, Detroit

Britain's ceramic equipment and supplies industry was strongly represented at the 1978 annual convention and exposition of the American Ceramic Society held this year in Detroit's Cobo Hall from 8 to 10 May when nine firms participated in a joint venture under the sponsorship of the British Ceramic Plant and Machinery Manufacturers' Association and the British Overseas Trade Board.

In addition to the nine companies' stands an information stand was manned by Christopher Hench, secretary of the British association and editor of *British Ceramic Review*.

Action was brisk from the start and Graham Davies, general sales manager of Service (Engineers) Ltd, reported that by the end of the opening day his company had seen 50 per cent of its US customers and had sold the plate-making machine demonstrated on the stand.

The British contingent was made up of firms which are experienced in doing business overseas, like Henshall Bamford and Partners, consultants to the ceramic industry, which has been active in the United States for the past six years, and manufacturers like Cannon Air Engineering whose managing director, Cyril Couch, said that the show (which was their seventh in the United States) was the best the firm had attended.

All the British participants were enthusiastic about the effectiveness of the exposition as a show-case for their products and a means of demonstrating their serious and continuing commitment to this important market.

They emphasised, however, that appearance at the show is only one part of any successful exporting programme and Tony Chapman, marketing manager of Meirswann Colours, said that visits at three-monthly intervals played an important part in his company's success in the United States.

In expressing the importance which members of his association attach to exhibiting in the United States, Mr Hench said that Britain had been noted for the production of good quality tableware in a tradition dating back over 200 years. Much of the technology which had contributed to the high quality of American pottery production has come from British equipment manufacturers, whose accumulated experience is well-recognised by the United States industry and, he added, is a valuable marketable commodity.

Have you a good export picture?

Each week *Trade and Industry* publishes pictures illustrating Britain's export business. Companies with export successes are invited to send in the story with a photograph showing the goods in manufacture, ready for despatch, or, preferably, on arrival overseas. The story must, of course, reach us while it is still news. Send your export photographs to the Editor, *Trade and Industry*, Room 439, 1 Victoria Street, London SW1H 0ET.

Overseas trade export services

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

New Heathrow facility nears completion

Installation of specialist equipment and container handling systems for the new Forwarders Bond project at Heathrow is continuing on schedule for the opening date due in the next few days.

During June, consolidations, containerised shipments and transhipments from all the airlines at Heathrow, consigned to the eight companies involved in the Forwarders' Bond consortium, will be phased into the system. Individual importers and clearing agents will continue to be advised of arrivals by the forwarder concerned direct from his import office in the normal manner.

All clearance procedures and agents' nominations will be carried out through the Laces computer system from the forwarders' existing import offices, but, in addition, the forwarders concerned will now be able to maintain a complete control on the physical movement of goods within their own facility.

The inventory control function of Laces will also be carried out at the new bonded facility to ensure the continual close monitoring of each individual arrival.

After clearance, importers or their clearing agents can collect their arrivals direct from the new facility, once again under the direct control of the forwarder concerned.

The forwarders concerned in the project are: AtlasAir (Atexco); Circle Airfreight; Hecny Airfreight Ltd; McGregor Swire Air Services; Meadows Airfreight; Mitchell Cotts Airfreight; Pandair Freight; PIE Transport.

Further information: circle 643

'Trilam' protects exports

A new range of cartons designed to contain pottery being exported to Switzerland has been produced by Boxfoldia Ltd, Birmingham.

Manufactured in 'Trilam', Boxfoldia's durable triple laminate of coated white paper/chipboard/paper, which, the company says, has proved more cost effective than other boards of a similar strength, the cartons are printed with a buff-coloured background and contain cups, saucers, mugs, plates or dishes.

'Trilam' board offers a high-quality printing surface and an attractive clean white inner finish which is important because all the packs have apertures to allow the contents to be viewed when displayed 'on the shelf'.

The cartons, designed to hold sets of three mugs or cups, are constructed of a locking sleeve with three apertures, while the remaining cartons in the range have tuck-in ends with a cover flap, aperture and security lock.

Further information: circle 644

International Express extends Cyprus service

International Express' Liverpool/Manchester depot has now become a continuous receiving point for the company's Cyprus direct container groupage service.

Continuous receiving is also available at the company's Elmdon, Birmingham and Camley Street, London, locations. Cargo is containerised within the depots for shipment by conference line sailings from London and, now, Liverpool.

The company says that, in comparison with traditional shipping methods, substantial savings can normally be made on fob charges by containerisation on the Cyprus route – and this can equally apply to Liverpool and Manchester shippers. Through freight rates on a commodity tariff are inclusive from UK terminals to Limassol port. There is guaranteed minimum weekly loading and departure sailings, using 20 and 40 ft containers.

Further information: circle 645

AtlasAir opens new office

To supplement its north-western development programme, AtlasAir, UK member of the World Air Cargo Organisation, has opened a new office at Carlisle. AtlasAir will be using part of the already established depot belonging to Atlas Express at St Nicholas Street, Carlisle.

The company will be offering a daily collection service throughout Cumbria, Dumfriesshire, Wigtownshire and Kirkcudbrightshire, up to 16.30 five days a week to connect with AtlasAir's worldwide network of services from the airports of Manchester, Glasgow and Heathrow.

Further information: circle 646

Cold service to the Gulf

Pan Arabian Transport is now offering direct overland refrigerated services to destinations in the Gulf including Kuwait, Sharjah, Abu Dhabi, Dubai and Doha.

The decision to operate refrigerated services on a regular basis has come after a series of pilot runs to the area with Pan Arabian's own Scania 111 units pulling hired refrigerated trailers.

Pan Arabian will collect from manufacturers' cold stores throughout the UK and offer delivery to any of the Gulf destinations in under 14 days.

Further information: circle 647

Gelders opens new depot in London

Gelders UK Transport has opened a new depot on the fringes of east London. Sited at Little Heath, Romford, Essex, the depot offers sales quotation facilities, storage and local distribution, as well as the usual Gelders' services.

These services, operating through Gelder's Northampton headquarters, are: daily services to France and Holland; two services a week to Austria and Germany; a weekly service to Italy; and a two-weekly service to Chicago in the United States.

Further information: circle 648

New base for Mercury in US

British airfreight agent, Mercury Airfreight International, has opened an office in New York to back up its existing consolidation services across the Atlantic.

Development work in the United States is to concentrate on Mercury's freight-all-kinds (Fak) tariff which, the company says, can save shippers at least 21 pence on every kilogramme flown to America, regardless of the destination, providing loads are over 300 kg. For consignments below that weight Mercury's normal consolidation rates apply.

Further information: circle 649

Export services: now every week

Export services will now appear every week in the pages of *Trade and Industry*

If your company has recently introduced a new service for exporters – in, for example, the packing, forwarding, shipping, airfreighting, banking or translation fields – we would be glad to have details, plus a good black and white photograph where appropriate.

Items for inclusion in this feature should be addressed to the Overseas Editor, 'Trade and Industry', Room 439, 1 Victoria Street, London SW1.

Advertisers who wish to be associated with this feature should contact Dudley Masters on 01-242-9478.

Overseas trade country data

Australia

Carbon coated film. A notice in *Trade and Industry*, 28 January 1977 reported that the Australian government had received a request for temporary protection against the import of carbon coated film falling within tariff item 39.01 or 39.02.

The government has now referred the matter to the Temporary Assistance Authority which has arranged for a public hearing in Sydney on 14 June at which interested parties may submit evidence.

The authority is required to make its report to the government within 30 days of the date on which the reference was made to them.

Inquiries: CRE 01-215 5319.

Anti-dumping – polypropylene resins. An application has been received by the Australian government from local industry for anti-dumping action to be taken against polypropylene resins being imported from the UK.

The Australian customs representative in London has been asked to carry out all necessary inquiries to establish tentative normal values for this product.

Pending completion of these inquiries, interim anti-dumping cash securities have been imposed with effect from 2 May 1978 on clearances of this item for home consumption.

Inquiries: General Division 01-215 5472.
Ref. CRE 36493/2

Works trucks, certain mobile machines, etc. A notice in *Trade and Industry*, 21 April, reported that the Australian Industries Assistance Commission (IAC) had been requested to inquire into the question of protection for

1 all goods of a kind falling within tariff item 87.07 which embraces, inter alia, mechanically propelled works trucks, of a kind used in factories, airports etc (including platform trucks, fork-lift trucks and straddle carriers); tractors of a kind used on railway stations; parts for such trucks and tractors; and

2 mobile machines incorporating elevating masts to which are normally attached forks, buckets, tines and the like falling within tariff items 84.22.5 and 84.22.9.

The IAC is now in a position to proceed with the inquiry and the public hearing has been arranged for Tuesday 13 June at 10.00 am in the Public Enquiry Room, 16th Floor, 59 Goulbown Street, Sydney, NSW.

UK firms or trade associations intending to submit evidence at the public hearings should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia immediately. Evidence may be submitted either through an accredited agent of the firm or trade association concerned or though the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4FW, tel. 01-930 2524, who will represent UK interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.
Ref: CRE 516/78

Canada

Appellations of origin as certification marks. On 15 December 1977, the Canadian government gave notice of its intention to terminate the Canada-France trade agreement. This 1933 agreement provided that no Canadian producer could use certain French geographical terms (called 'appellations of origin') to describe products made in Canada.

A draft of the proposed amendments to the Canadian trade mark law which would allow for the registration of appellations of origin as certification marks is available for public inspection at the Chancery House Annexe of the Science Reference Library (Holborn Division), Chancery House, Lower Ground Floor, Chancery Lane, London WC2A 1AY.

Denmark

Aromatics ban. In pursuance of the Danish Food Act 310 of 6 June 1973, the Danish Ministry of Environment has issued a promulgation order banning certain aromatic substances etc in foodstuffs. This order will enter into force on 1 September 1978.

Copies of the order can be obtained from OTAR 01-248 5757 ext. 408/423.

Fiji

Import duty changes on video tapes and gramophone records. The Fiji Comptroller of Customs and Excise has announced, with effect from March 1 1978, the following amendment to the first schedule of the customs tariff act:

Item no.	Description	Import duty: Fiscal	Import duty: Customs	Export duty
	92.12 Gramophone records and other sound or similar recordings; matrices for the production of records, prepared record blanks, film for mechanical sound recording, prepared tapes, wires, strips and like articles of a kind commonly used for sound or similar recording:			
92.12.00.01	Video tapes	10%	Free	Free
92.12.00.09	Other	50%	7½%	Free

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Finland

Tax on certain foodstuffs. The Finnish authorities have amended the rates of excise tax levied on certain foodstuffs. In addition, yoghourt under CCCN 04.01 has been removed from the list of products affected; casein, caseinates and other casein derivatives under CCCN 35.01 have been added to the list; and the breakdown of certain preparations under CCCN 19.02 containing flour, starch or malt extract has been altered.

Inquiries: OTAR 01-248 5757 ext. 460.

Gibraltar

Import duty amendments. The Gibraltar *Government Gazette*, 4 May, contained the Finance Ordinance, 1978, which amended the rates of import duty on the following goods:

	New import duty rate
Whisky, in bottles, per gallon	612p
Whisky, in casks, per gallon	606p
Brandy, in bottles, per gallon	612p
Brandy, in casks, per gallon	606p
Gin, rum and other spirituous liquors, other than liqueurs:	
a in bottles, per gallon	648p
b in casks, per gallon	640p
Liqueurs and cordials irrespective of strength:	
a in bottles, per gallon	744p
b in casks, per gallon	738p
Manufactured tobacco, not otherwise enumerated including chopped, pressed or packed, shredded, long cut and rolled, plug, snuff, siftings and cigars, per lb	345p
Manufactured cigarettes, per lb	160p with an additional duty of 830p per 1000 cigarettes

Inquiries: OTAR 01-248 5757 ext. 458/461.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Iraq

Urgent document transmission. Many British companies have experienced difficulty in forwarding urgent tender documents to and from Iraq.

It is understood that British Airways will now be glad to accept such consignments as air cargo.

Documents from the United Kingdom for despatch to Iraq should be handed to the British Airways Cargocentre at the south side of Heathrow Airport at least six hours before the departure of a flight.

The consignor should specify on which flight the documents are to go and they should if possible be packed in a conspicuous container.

Italy

Import of television receivers. The *Gazzetta Ufficiale* 55, 24 February 1978, published a ministerial decree of 6 February, on the regulations regarding the import into Italy of television reception apparatus.

The decree deals with marking and labelling requirements for tv sets and with certificates of approval, to be issued by the appropriate Italian authorities.

Copies of the decree, in Italian, are available. An English translation will be available shortly.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Import surveillance on wool. Italian Ministry of Foreign Trade circular 38, 7 April, imposed surveillance measures on the import of all products under CCCN 53.05 (sheep's or lamb's wool or other animal hair (fine or coarse), carded or combed, imported from any country including the EEC.

The importer will have to obtain an import declaration and a proforma invoice will be required.

Further details of the surveillance measures will be published shortly.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Plastic containers for contact lens products. The *Gazzetta Ufficiale* 71, 13 March, published ministerial decree of 24 February which authorises the use of plastic containers, previously prohibited, for eye drop, baths, lotions and cleaning substances for contact lenses.

Firms wishing to market products in plastic containers are required to satisfy the Italian authorities that the plastic does not in any way alter the contents.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Snail-killing preparations and insecticides. The *Gazzetta Ufficiale* 93, 5 April, published a ministerial decree of 6 March, which requires all snail-killing preparations and insecticides for flower growing and gardening to be registered as medical specialities.

Firms involved in the manufacture and trade of such products must make application for registration, within 180 days of the publication of the decree, to the Ministry of Health, General Directorate of Pharmaceutical Services, Division V.

Firms already marketing such products in Italy may continue to do so provided the necessary application for registration is submitted within the appropriate time limit.

Copies of the ministerial decree, in Italian, are available.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Jordan

Customs duties amendments. The Jordanian authorities published in *Official Gazette* 2776, 16 April, details of the following amendments to the customs tariff which took effect from 16 April.

tariff no.	Description	Unit	Rate of duty
04.02	Milk and cream, preserved, concentrated or sweetened		
a	Infants powdered milk in which the proportion of fat is not over 29%, packed in airtight tins, contents of which do not exceed 5.5 lb, provided that each tin bears clear information about the methods of use for infants nutrition	ad val	Exempt
b	Sour milk lumps (Jamid)	ad val	Exempt
c	Other		
1	For yoghurt and dairy industry	ad val	Exempt
2	For the manufacture of chocolate	ad val	1%
3	Other	ad val	14%
04.03	Butter and Samneh (boiled spiced butter)		
a	Butter	ad val	Exempt
b	Samneh (boiled spiced butter)	ad val	Exempt
55.05	Cotton yarn not put for retail sale	ad val	Exempt
84.10	Pumps		
a	Water or petrol pumps for engines	ad val	23%
b	Other	ad val	Exempt

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Norway

Global quotas for imports, 1978. Norway has established the following global quotas for imports for 1978. The global quota area covers all countries.

Tariff no.	Commodity [1]	quota ('000 Kr. fob unless otherwise stated)
ex Chapter 1 [2]	Live animals, not for food	7 000
ex 02.04	Meat of moose	2 000 or 100 tonnes
ex 02.04	Meat of red deer	625 or 25 tonnes
ex 04.04	Cheese and cheese paste (excluding parmesan cheese)	700 tonnes
ex 04.04	Parmesan cheese	Liberalised licensing
ex 06.01 [2]	Flower bulbs to market-gardens	16 000 or 1 000 tonnes
ex 06.02 [2]	Live plants, tubers, tuberous roots and the like	35 000
06.03 [2]	Cut flowers (most of flower imports – liberalised licensing during winter season)	5 000
ex 07.01	Mushrooms, fresh	Liberalised licensing
ex 16.02	'Turkey roll'	125 or 5 tonnes
17.02 [2]	Glucose, special quality to industry	380 or 200 tonnes
ex 20.02	Mushrooms, hermetic	525 or 75 tonnes
ex 20.02	Roasted onions	250 or 15 tonnes
ex 20.07 [2]	Fruit and vegetable juices	8 000

[1] The commodity specification is in certain cases somewhat too wide. In these cases the amount of the global quota only applies to commodities subject to global licensing. [2] For these goods the quotas are meant to cover supplementary imports when Norwegian production does not meet demand.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Environmental tax on motor cars and vans. The Norwegian authorities have announced that a new, extra tax of 450 kroner will be added to the price of new motor cars and vans with effect from 3 May 1978.

The aim behind this new tax is to protect the environment by providing an incentive for owners to deliver old cars and vans to one of the special depots which have been established.

A sum of 500 kroner will be paid to such owners who deliver their old car or van to one of these scrap depots.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Suriname

Name change. The government of Suriname has recently issued a resolution to the effect that the name of the country should henceforth be uniformly spelled in all languages as 'Suriname'.

Thailand

Import of large passenger vehicles. The Thai Ministry of Commerce has issued the Importation of Goods (No 88) BE 2521 (1978) Notice which came into force on 6 April. Under its terms anyone importing into Thailand six-wheel passenger vehicles with 30 or more seats, will have to obtain a permit from the Ministry of Commerce or a person authorised by them, except in those cases where the vehicle was loaded for transport in the country of origin, for export to Thailand, before the date of this notice coming into force.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

United States

Stainless steel flatware. Following the notice issued in *Trade and Industry*, 13 January, the International Trade Commission recommended, on 8 May, to the President that tariffs on stainless steel flatwear be increased for the next five years.

The Office of the Special Representative for Trade Negotiations has invited interested parties to comment by 30 May.

Comments should be submitted to the above organisation at 1800 G Street NW, Washington DC 20506.

Inquiries: CRE 01-215 5397.

Imports of speciality steels under quota. Imports in pounds weight for the remaining product with quota still open as at 12 May 1978:

Plates of stainless steel (item 923.21)	7 090 205

Inquiries: CRE 01-215 5629.

CRE tel. Direct dialling

OTAR telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			£ million 18,401	10,528	1,830	1,929	£ million		
1971	101.8	32 675	9 682	1 988	1 922	92	−148	52	18	1 074	279	795
1972	104.2	34 542	9 797	1 721	2 035	34	−145	48	15	126	−701	827
1973	110.4	36 062	10 253	1 730	2 377	1,321	597	102	379	−983	−2 354	1 471
1974	109.5	35 631	10 287	1 964	2 300	596	634	81	−109	−3 515	−5 195	1 680
1975	107.2	35 269	9 640	1 695	1 921	−842	−429	−111	−65	−1 614	−3 205	1 591
1976	109.7	35 406	9 444	1 633	1 900	97	5	23	9	−1 107	−3 510	2 403
1977	110.6	35 133	9 072	1 761	2 072	423	219	103	17	−35	−1 612	1 577
1976 2nd qtr.	109.2	8 793	2 346	400	468	−12	−66	−20	−45	−345	−909	564
3rd qtr.	109.5	8 879	2 377	414	488	5	−2	14	16	−377	−1 097	720
4th qtr.	111.1	8 928	2 343	422	496	105	73	3	5	−338	−961	623
1977 1st qtr.	110.0	8 758	2 260	418	502	233	125	51	102	−505	−947	442
2nd qtr.	110.7	8 644	2 293	433	508	228	164	39	−5	−364	−764	400
3rd qtr.	110.9	8 831	2 265	456	530	−31	−31	5	−44	483	54	429
4th qtr.	110.8	8 900	2 254	455	533	−7	−40	7	−36	351	45	306
1978 1st qtr.		9 070 pe							61	−220	−520	300 e
% change last 2 qtrs. on prev. 2 qtrs.	+0.5	+2.8	−0.7	+7.1	+5.2							
on a year earlier	+0.5	+1·6	−4.3	+9.0	+8.0							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)				Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count		Export	Import
	at 1970 prices		at 1971 prices	monthly averages	(not seasonally adjusted)				(old series)					On a balance of payments basis	
Base of index £m in base year Series in	1970	1970	1971 16,296	thousands	Jan. 1974		1970	1970	Jan. 1970	thousands		thousands		1975 19,462	1975 22,667
														at 1975 prices	
1971	100.1	99.4	100.0	108.5	80.0	9.4	104.6	109.0	118.7	775.8	3.4	130.9		84.6	83.3
1972	102.3	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.0	854.9	3.7	147.3		84.5	92.4
1973	110.0	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.1	611.0	2.6	307.0		96.8	105.6
1974	106.3	108.9	109.0	102.8	108.5	16.0	215.3	152.0	179.1	599.7¶	2.6¶	302.7¶		103.9	107.9
1975	100.6	102.2	106.7	97.2	134.8	24.2	235.4	188.7	226.6	929.0	3.9	150.0¶		100.0	100.0
1976	101.4	103.2	106.5	104.7	157.1	16.5	299.0	219.6	261.9	1 269.8¶	5.4¶	120.4¶		109.9	105.5
1977	102.4	103.7	103.6	107.1	182.0	15.8	340.1	261.7	288.5	1 378.1	5.8	155.6¶		118.9	107.0
1977 1st qtr.	103.2	105.3	103.3	104	174.1	16.5	341.5	248.0	280.0	1 329.5	5.6	..		115.7	109.1
2nd qtr.	101.9	103.0	102.5	103	181.9	17.4	347.7	259.2	285.3	1 340.6	5.6	157.7		118.0	109.8
3rd qtr.	102.7	103.7	104.3	112	184.7	16.5	340.5	267.7	288.3	1 414.6	5.9	151.9		124.1	106.4
4th qtr.	101.9	102.8	104.4	110	187.4	13.1	330.6	272.1	300.4	1 427.8	6.0	160.1		117.9	102.6
1978 1st qtr.	103.6 p	103.9 p	106.3	129	190.6	9.5	326.7	278.9	310.6 p	1 409.4	5.9	187.7		120.5 p	113.6 p
1977 June	100.3	100.6	102.1	95	183.6	17.7	345.2	262.4	286.5	1 364.3	5.7	158.1		121.9	114.5
July	102.8	104.2	104.8	113	183.8	17.6	344.5	265.8	286.3	1 398.5	5.9	155.2		123.1	110.4
Aug.	102.6	103.3	104.7	116	184.7	16.5	338.8	268.1	287.7	1 410.3	5.9	153.4		123.4	101.3
Sept.	102.6	103.5	103.5	107	185.7	15.6	338.1	269.2	291.0	1 434.9	6.0	147.2		125.9	107.5
Oct.	101.7	102.5	102.7	116	186.5	14.1	333.8	271.0	295.8	1 431.5	6.0	156.0		119.4	101.3
Nov.	101.6	102.1	103.1	108	187.4	13.0	329.9	272.0	300.5	1 429.6	6.0	159.4		115.3	98.4
Dec.	102.5	103.6	106.9	104	188.4	12.1	328.0	273.3	304.8	1 422.3	6.0	165.0		118.9	108.1
1978 Jan.	103.2	103.4	104.9	125	189.5	9.9	324.9	277.1	306.3	1 419.2	5.9	180.3		112.3	114.3
Feb.	103.9	103.9	106.8	120	190.6	9.5	324.2	279.2	311.2	1 409.0	5.9	187.0		127.9	†10.1
Mar.	103.7 p	104.5 p	107.0	142	191.8	9.1	330.9 p	280.5 p	314.2p	1 400.0	5.9	195.8		121.4	116.4
Apr.			106½	132	194.6	7.9	337.2 p	282.6 p		1 387.1	5.8	203.7		126.3 p	102.6 p
May										1 366.4 p	5.7	209.9 p			
% change latest 3 months on prev. 3 months	+1.7	+1.1	+1.6	+16.9	+2.1		+1.0	+2.4	+3.4	−2.3		+14.5		+8½	+2½
on a year earlier	+0.4	−1.3	+4.1	+22.0	+8.8		−4.3	+11.7	+10.9	+4.2		+30.0		+8	+4½

p Provisional pe Preliminary estimate e Estimate .. Not available ¶ Average of available months

Inquiries: 01-215 3453

Engineering sales and orders up to February

SIC orders VII, VIII and IX

Provisional trend estimates and seasonally adjusted volume indices of engineering sales and orders up to February show a continuing improvement in the inflow of orders from the home market, and a check in the previously declining trend of new export orders. Home sales appear to have recovered somewhat from the low level of the end of last year, but the trend of export deliveries has been flat recently. The small rise in orders-on-hand was due to the home order book lengthening slightly from its weak position.

Considering first the home market, the stronger inflow of new orders (net of cancellations) in the three months to February produced a 3 per cent rise in trend compared with the previous period. This improvement, which is attributable mainly to industries within mechanical engineering, resumes the recovery which occurred throughout 1976 but was interrupted in the first half of 1977. Domestic sales rose by 3 per cent between

New Business Monitor on engineering sales and orders

Users of the statistics in this article and the similar indices of sales and orders for the three broad sectors of engineering published in the monthly Business Monitor PM 33-36, will be interested in a new quarterly Business Monitor appearing shortly. This contains information on sales and orders in much greater industry detail than has hitherto been published. Annual and quarterly, seasonally adjusted, series of nine volume indices – sales, orders-on-hand and new orders for home, export and total markets – are shown for each of the 36 industries within mechanical, instrument and electrical engineering. Previously only the current values of sales and the index of production have been available at this disaggregated level – the former in the relevant quarterly monitor in the production series and the latter in articles in *Trade and Industry* (most recently, 28 April 1978).

The new monitor, PQ 33-36 Engineering (volume indices of sales and orders) is available at an annual subscription of £1.56. The first issue contains figures up to the fourth quarter of 1977. Subscription inquiries should be addressed to HMSO, PO Box 569, London SE1 9NH.

Volume index numbers for the combined engineering industries up to February

	Total			Home			Export		
	1970 average = 100	1970 average monthly sales = 100		1970 average = 100	1970 average monthly sales = 100		1970 average = 100	1970 average monthly sales = 100	
	Orders-on-hand (end of period)	New orders	Sales	Orders-on-hand (end of period)	New orders	Sales	Orders-on-hand (end of period)	New orders	Sales
Ratio: orders-on-hand/av. monthly sales in 1970 [1]	6.7			6.3			7.6		
Trend estimates									
1976p									
January	95	92	105	89	87	99	110	105	121
February	94	93	105	87	88	99	108	107	122
March	92	94	105	86	89	99	106	108	122
April	90	95	105	84	90	99	105	111	122
May	89	97	106	83	91	100	104	114	121
June	88	99	105	81	92	100	104	120	120
July	88	103	105	80	93	100	106	128	120
August	88	105	105	80	94	99	107	135	120
September	88	107	105	79	95	99	110	140	121
October	89	109	106	78	97	100	112	141	122
November	89	109	106	78	98	100	115	139	123
December	90	109	107	78	99	101	116	136	123
1977 p									
January	90	109	107	78	99	101	118	134	123
February	90	108	107	77	99	101	119	132	124
March	90	107	107	77	99	100	119	131	125
April	90	106	107	77	98	99	120	130	126
May	90	106	106	76	97	99	120	131	128
June	90	105	107	76	96	98	120	130	130
July	90	105	106	76	96	97	120	128	131
August	89	105	106	76	97	97	120	126	130
September	89	105	106	76	98	97	119	124	129
October	89	105	105	76	99	97	119	124	128
November	90	107	105	77	100	97	118	125	127
December	90	108	106	77	101	98	118	127	127
1978p									
January	90	110	107	77	102	99	118	131	127
February	90	111	108	78	103	100	118	134	127
Percentage change [2] Nov 1977-Feb 1978	+1.0	+4.5	+2.0	+1.5	+3.0	+3.0	—	+7.0	+0.5
Seasonally adjusted									
1970	99	100	100	99	100	100	99	101	100
1971	90	94	99	92	96	99	83	90	100
1972	96	104	100	100	107	103	89	96	92
1973	127	129	111	127	129	114	128	128	103
1974	128	115	115	122	110	113	142	128	119
1975	97	93	110	90	89	106	112	102	121
1976 p	89	101	105	77	93	99	117	124	121
1977 p	90	107	106	78	99	98	119	129	127
1976 p									
1st qtr	92	94	104	86	89	98	107	109	122
2nd	88	96	106	81	91	101	102	107	121
3rd	88	106	105	79	95	100	108	134	120
4th	89	109	105	77	96	99	117	144	122
1977 p									
1st qtr	90	109	108	77	101	102	119	130	124
2nd	90	106	106	76	95	98	121	133	129
3rd	89	106	107	76	98	98	119	127	131
4th	90	107	104	78	100	96	119	125	124
1976 p									
January	95	95	107	89	92	100	110	106	124
February	94	96	103	88	89	97	109	117	120
March	92	91	103	86	85	96	107	106	121
April	91	94	108	84	91	102	105	104	123
May	89	98	112	82	93	106	103	111	128
June	88	94	100	81	89	95	102	106	112
July	88	109	104	80	92	98	107	154	119
August	88	105	105	80	95	100	108	131	119
September	88	103	106	79	97	101	108	118	121
October	89	115	107	78	97	101	113	162	124
November	90	112	105	78	97	98	116	150	123
December	89	100	105	77	93	99	117	121	120
1977 p									
January	90	112	111	77	105	104	117	131	129
February	90	112	108	78	104	102	118	133	123
March	90	103	104	77	94	98	119	127	120
April	90	109	108	77	99	100	120	138	129
May	91	107	104	77	95	96	122	139	126
June	90	100	107	76	92	98	121	122	130
July	89	105	108	76	100	99	119	118	132
August	90	110	105	76	99	97	120	139	128
September	89	103	107	76	94	97	119	126	133
October	89	107	106	76	98	97	119	129	129
November	89	100	101	77	98	93	117	107	122
December	90	113	105	78	104	99	119	138	120
1978p									
January	90	106	111	78	104	103	117	111	134
February	91	117	108	78	101	100	120	159	129
Sept-Nov 1977 (av.)	89	103	105	77	97	96	117	121	128
Dec 1977-Feb 1978 (av.)	91	112	108	78	103	101	120	136	128
Percentage change [2]	+2.0	+8.5	+3.0	+1.5	+6.5	+5.0	+2.5	+12.5	−0.5

Notes to table

[1] This ratio shows the number of months work in the order book in the base year at the then average rate of sales. [2] For orders-on-hand, the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period. The percentage changes have been based on the unrounded values and are given to the nearest half percentage point. p Provisional.

November and February, after a gradual decline throughout most of last year; as they still remained below the level at which new contracts were received, order books rose by 1½ per cent between the end of November and February.

The increase in new home orders was reinforced by a strong rise in orders from overseas, resulting in a 4½ per cent increase in the trend for the combined markets. The high February intake of export orders was largely due to a few individual contracts (in metal-processing machinery, generating equipment and electronic capital goods), and this level is unlikely to be maintained. The rate of export deliveries has been steady on average in recent months, after falling back slightly in the second half of last year; this effect, combined with the increase in home sales, produced a 2 per cent rise in the trend of total sales. Export order books have on average remained unchanged for several months, with some fluctuations in the level. Orders-on-hand for the combined markets rose by 1 per cent during the three months to February as new orders were overall at a higher level than sales.

The revised figures published in this table are based on the Monthly Engineering Inquiry relating to February 1978. The response rate of 81 per cent to the inquiry for February 1978 is judged sufficient to justify publication of provisional indices for this month. Taking into account late returns now received for November and December 1977 and January 1978 response rates for these months were 91, 89 and 86 per cent respectively.

An expanded commentary, together with additional tables, is given in Business Monitor PM 33-36, Engineering (volume indices of sales and orders), obtainable from HMSO, PO Box 569, London SE1 9NH, post free for a subscription of £4.32 per annum. Separate commentaries and volume indices are given for sales, orders-on-hand and net new orders for total, home and export markets, for mechanical, instrument and electrical engineering (SIC orders VII, VIII and IX respectively).

Inquiries: *Department of Industry, Room* 618, Dean Bradley House, 52 Horseferry *Road, London SW1P 2AG, tel. 01-212 5770.*

Statistical News

This quarterly publication, prepared by the Central Statistical Office, is designed to keep the user of statistics in touch with all that is going on in the world of official statistics. Each issue contains notes on current developments as well as several articles treating selected topics in greater depth. A list of new surveys reported to the CSO's survey control unit is also included.

Price 80p (by post 92p), annual subscription including postage £3.68, from HMSO, PO Box 569, London SE1 9NH
ISSN 0017-3630

Index of industrial production for March

Figures for the index of industrial production up to March 1978 suggest that the underlying level of output, after changing little during the latter part of 1977, showed some increase in the first quarter of 1978.

Before any adjustment (apart from regular seasonal factors) the provisional estimates show that the average level of the all-industries' index in the first quarter of 1978 was some 1½ per cent higher than the preceding quarter; the corresponding index for manufacturing alone was about 1 per cent above its level in the preceding quarter. An analysis by broad market sector shows that, over the same period, the output of consumer goods industries fell by ½ per cent, the output of investment goods industries rose by 1½ per cent, and the output of intermediate goods industries, which include fuels, rose by 3½ per cent.

On longer-term comparisons, the all-industries' index in the first quarter was ½ per cent above its level in the same period a year ago; a similar comparison for manufacturing industries shows a fall of 1½ per cent.

As an aid to interpretation of movements in the economy, the quarterly figures shown below represent industrial production by all industries other than those engaged in exploration for, and extraction of, mineral oil, natural gas and natural gas condensates on land and offshore:

1977	1st qtr	102.3	1978	1st qtr	102.4
	2nd	101.0			
	3rd	101.6			
	4th	100.9			

The index numbers in the adjoining tables are all seasonally adjusted. The seasonal adjustment process is designed to remove annually recurring month to month variations due, for example, to the incidence of holidays and other regular seasonal patterns of behaviour. The adjustments, however, can

Index of industrial production: summary table

Seasonally adjusted — 1970 = 100

	Total all industries	All industries other than construction	Mining and quarrying	Total manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering and allied industries	Textiles, leather and clothing	Other manufacturing	Construction	Gas, electricity and water
Weights	1 000	850	37	745	84	65	57	319	76	144	146	72
1971	100.1	99.8	100.0	99.4	100.7	102.3	91.3	98.7	102.2	100.8	101.8	104.0
1972	102.3	102.1	84.1	102.0	105.0	107.5	91.4	99.2	104.5	107.1	103.5	111.6
1973	*110.0*	*110.5*	*92.6*	*110.5*	*109.3*	*119.5*	*100.0*	*107.2*	*110.2*	*118.9*	*107.9*	*118.3*
1974	106.3	108.5	79.2	108.9	109.9	124.6	91.7	108.3	103.1	112.1	93.8	118.9
1975	100.6	103.1	86.0	102.2	108.8	113.3	78.6	103.1	99.7	102.2	86.1	120.8
1976	*101.4*	*104.3*	*88.7*	*103.2*	*110.9*	*124.3*	*85.3*	*98.8*	*101.9*	*106.3*	*84.5*	*123.5*
1977	102.4	105.8	103.8	103.7	112.3	127.4	80.6	99.3	101.3	107.8	83.2	128.2
1976												
4th qtr	102.9	105.9	92.1	104.6	111.5	128.3	85.1	99.6	103.7	109.2	85.7	125.3
1977												
1st qtr	103.2	107.1	102.4	105.3	112.7	129.2	83.9	100.3	104.7	109.6	80.9	127.7
2nd	*101.9*	*105.5*	*104.0*	*103.0*	*111.2*	*128.6*	*80.5*	*98.8*	*100.2*	*106.1*	*81.7*	*131.3*
3rd	102.7	105.9	105.1	103.7	110.2	128.2	83.3	99.3	100.9	107.8	84.3	128.7
4th	101.9	104.7	103.6	102.8	115.2	123.4	74.8	98.8	99.4	107.7	85.8	124.9
1978												
1st qtr p	103.6	106.6	109.0	103.9	113.6	127.3	76.9	100.2	100.2	108.6		132.9
1977												
Apr	102.2	105.8	102	103.5	113	129	77	99	102	107		131
May	*103.3*	*107.0*	*105*	*104.8*	*112*	*130*	*89*	*100*	*101*	*108*		*130*
Jun	100.3	103.5	105	100.6	109	128	75	97	98	103		133
Jul	102.8	106.0	104	104.2	111	127	87	100	102	107		125
Aug	102.6	105.8	105	103.3	109	131	79	99	99	109		132
Sep	*102.6*	*105.8*	*106*	*103.5*	*110*	*127*	*85*	*99*	*101*	*107*		*129*
Oct	101.7	104.4	103	102.5	114	123	75	99	100	107		124
Nov	*101.6*	*104.3*	*103*	*102.1*	*116*	*125*	*70*	*98*	*97*	*108*		*127*
Dec	102.5	105.4	104	103.6	116	123	79	99	101	108		124
1978												
Jan	103.2	106.1	108	103.4	114	125	76	100	99	108		133
Feb	103.9	107.0	111	103.9	114	126	78	100	100	109		137
Mar p	*103.7*	*106.7*	*108*	*104.5*	*113*	*131*	*77*	*101*	*101*	*108*		*129*
Percentage change latest three months on:												
1 previous three months	1.7	1.8	5.2	1.1	−1.4	3.2	2.7	1.4	0.8	0.8		6.4
2 a year earlier	0.4	−0.4	6.4	−1.3	0.7	−1.5	−8.3	−0.2	−4.4	−0.9		4.1

p Provisional.

Index of industrial production: detailed analysis

Seasonally adjusted — 1970 = 100

	Mining and quarrying		Food, drink and tobacco		Chemicals, coal and petroleum products		Metal manufacture		Engineering and allied industries				
	Coal mining	Other mining and quarrying	Food	Drink and tobacco	Coal and petroleum products	Chemicals and allied industries	Ferrous	Non-ferrous	Total engineering	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering
Weights	30	7	52	32	7	58	43	14	182	100	15	67	16
1971	98.4	106.5	99.9	101.9	103.3	102.1	89.8	95.8	99.4	97.4	103.3	101.6	98.7
1972	76.4	116.3	104.0	106.5	102.5	108.1	89.4	97.3	99.1	93.6	101.9	106.6	89.5
1973	84.2	127.1	106.3	114.2	110.0	120.7	97.3	108.5	109.7	101.8	110.1	121.3	90.6
1974	70.0	117.1	104.5	118.8	106.0	126.9	87.7	104.2	113.1	106.2	117.8	122.6	92.4
1975	81.1	106.5	101.4	121.1	92.0	116.0	74.2	92.3	108.7	104.2	118.5	113.4	97.7
1976	74.7	146.4	103.7	122.7	96.5	127.8	82.0	95.5	103.6	97.3	113.3	110.8	92.0
1977	72.8	232.1	106.2	122.5	93.2	131.7	76.7	92.7	103.2	94.0	115.4	114.3	84.6
1976													
4th qtr	73.6	168.5	104.0	123.8	98.5	132.1	81.5	96.2	104.1	95.5	118.1	114.0	91.2
1977													
1st qtr	74.1	219.7	106.8	122.6	95.9	133.4	79.4	97.7	105.4	97.7	113.7	115.2	82.8
2nd	73.5	230.2	104.6	122.0	94.3	133.0	76.5	92.8	101.7	93.3	115.9	111.2	90.8
3rd	72.3	240.9	105.0	118.8	92.6	132.7	81.0	90.4	103.6	93.5	115.7	116.0	82.3
4th	71.2	237.5	108.2	126.8	90.2	127.6	69.9	90.1	102.2	91.6	116.6	115.0	82.4
1978													
1st qtr p	73.5	255.8	106.6	124.9	90.7	131.9	72.7	89.7	104.2	94.7	119.4	115.2	86.2
1977													
May	74	235	105	122	94	134	88	92	102	93	116	111	93
Jun	73	235	102	121	95	132	71	90	101	92	116	112	90
Jul	73	233	105	122	94	131	85	91	103	94	116	115	75
Aug	72	244	105	116	92	136	75	88	104	94	116	116	88
Sep	72	246	105	118	92	131	82	92	104	93	115	117	85
Oct	72	235	106	127	88	127	70	91	102	91	116	115	78
Nov	71	236	109	126	87	129	65	88	102	92	117	115	90
Dec	71	241	109	128	95	126	75	91	102	92	117	115	79
1978													
Jan	73	255	108	124	89	130	71	90	103	94	118	115	83
Feb	74	263	105	127	89	130	75	88	104	95	120	115	86
Mar p	74	250	107	124	95	135	73	91	105	95	121	116	89
Percentage change latest three months on:													
1 previous three months	3.2	7.7	−1.4	−1.4	0.6	3.4	4.1	−0.5	2.0	3.4	2.5	0.2	4.6
2 a year earlier	−0.8	16.4	−0.1	2.0	−5.4	−1.1	−8.4	−8.2	−1.1	−3.0	5.1	0.0	4.2

	Engineering and allied industries (cont)				Textiles, leather and clothing			Other manufacturing					
	Total vehicles	Motor vehicles	Other vehicles	Metal goods not elsewhere specified	Textiles	Leather, leather goods and fur	Clothing and footwear	Total bricks, pottery glass, etc.	Bricks, cement, etc	Pottery and glass	Timber, furniture, etc	Paper, printing and publishing	Other manufacturing industries
Weights	73	45	28	48	49	3	24	27	17	10	22	64	31
1971	100.2	100.5	99.7	93.3	100.6	103.0	105.4	108.4	107.0	110.5	103.0	97.3	99.8
1972	104.0	102.2	106.8	95.4	102.9	104.5	107.8	115.9	115.1	117.2	113.5	102.7	104.3
1973	107.6	104.6	112.6	102.9	108.6	101.4	114.6	126.6	123.8	131.1	132.6	112.1	116.7
1974	103.0	95.5	115.2	103.6	99.2	96.3	112.2	117.1	108.3	130.9	112.1	108.9	114.5
1975	95.3	87.8	107.6	95.0	93.8	98.3	112.2	107.9	99.7	120.8	110.2	95.6	105.5
1976	91.9	89.4	96.0	93.8	97.4	102.1	111.0	111.2	101.9	125.7	112.5	98.1	114.7
1977	93.3	94.6	91.2	98.4	93.6	97.8	117.7	108.9	95.8	129.4	105.7	102.1	120.0
1976													
4th qtr	91.9	91.2	93.2	96.8	99.4	102.6	112.5	110.7	99.6	128.2	114.5	100.9	121.1
1977													
1st qtr	92.6	94.0	90.4	98.6	98.7	104.7	117.2	109.4	96.3	129.9	110.4	102.8	122.9
2nd	94.2	96.1	91.1	97.2	92.5	95.8	116.6	107.8	94.1	129.4	100.6	101.3	118.6
3rd	92.8	93.3	91.9	98.6	92.8	95.6	118.4	110.3	95.6	133.3	104.9	101.4	120.7
4th	93.6	95.1	91.2	99.0	90.4	95.0	118.4	108.1	97.3	125.0	106.7	102.9	117.8
1978													
1st qtr p	93.2	96.3	88.1	99.9	92.6	94.1	116.6	109.6	94.5	133.1	103.5	103.0	122.8
1977													
May	99	102	93	100	93	96	117	111	96	134	102	102	122
Jun	88	88	89	94	90	96	115	105	93	124	95	100	114
Jul	96	98	93	100	95	96	119	110	93	136	104	101	121
Aug	90	89	91	98	91	96	117	109	96	129	106	103	123
Sep	92	93	92	97	93	96	119	111	97	134	105	101	118
Oct	94	95	93	99	92	95	118	107	94	126	107	102	118
Nov	91	91	91	99	90	95	113	108	97	126	103	103	120
Dec	96	100	90	100	90	95	124	109	100	122	110	104	116
1978													
Jan	94	98	88	100	92	94	115	110	94	136	102	103	122
Feb	92	93	90	100	93	94	116	109	94	133	105	104	123
Mar p	93	98	87	100	93	94	119	109	95	131	104	102	123
Percentage change latest three months on:													
1 previous three months	−0.5	1.2	−3.4	0.9	2.4	−0.9	−1.5	1.4	−2.8	6.5	−3.0	0.0	4.2
2 a year earlier	0.6	2.4	−2.6	1.3	−6.2	−10.2	−0.5	0.1	−1.9	2.5	−6.3	0.1	−0.1

p Provisional.

in general only be derived from analysis of past experience and may not be completely appropriate when holiday patterns change sharply. Changes in recent years in the amount and incidence of industrial holidays taken between Christmas and new year's day and around the spring bank holiday may not be fully reflected in the seasonally adjusted estimates.

Inquiries: 01-233 7239.

Carpet industry sales in February

The daily rate of carpet manufacturers' sales by value in February 1978 at current prices was provisionally estimated to have been 1 per cent more than in February 1977 assuming 20 working days in February 1978 and 20 working days in February 1977. In the three months ended February 1978 the daily rate of manufacturers' sales was provisionally estimated to have been 3 per cent more than in the corresponding period 12 months ago, assuming 61 working days in the period ended February 1978 and 62 working days in the period ended February 1977. The index numbers which are of manufacturers' sales by value, have been adjusted for the length of the working month, but not for non-statutory holidays or other seasonal factors. The wholesale price index of carpets is shown as a guide to the movement in prices.

Inquiries: 01-212 0017.

Index of carpet manufacturers' sales

1970 = 100

	Index of manufacturers' sales at current prices	Wholesale price index
1969	93	96.6
1970	100	100.0
1971	115	104.9
1972	135	111.7
1973	166	130.2
1974	179	153.1
1975	202	177.8
1976	234	211.3
1977	255	249.8
1976		
4th	283	224.0
1977		
1st qtr	260	239.3
2nd	239	249.6
3rd	230	252.3
4th	292	257.7
1976		
November	288	222.1
December	273	228.5
1977		
January	245	237.3
February	265	239.2
November	297	257.4
December	286	258.6
1978		
January	253	265.6
February	268	269.8

Man-made fibres: deliveries in first quarter, production in March and analysis of production in first quarter

Deliveries of staple fibre [1]

Thousand tonnes

	Total	Home: Total	Cotton spinning	Wool spinning	Flax spinning	Other systems and sundries	Exports [2]
1968	282.4	173.1	52.3	58.2	26.3	36.3	109.3
1969	299.3	169.2	51.1	51.5	28.0	38.6	130.1
1970	329.4	191.4	57.6	57.1	31.5	45.2	138.1
1971	338.7	185.9	59.6	50.1	29.3	46.9	152.9
	Total	Home: Total	Cotton spinning	Wool spinning	Other systems and sundries		Exports [2]
1972	363.9	186.4	49.5	33.4	103.5		177.5
1973	434.8	235.4	62.8	56.0	116.7		199.4
1974	346.1	190.4	51.4	51.1	87.9		155.7
1975	283.2	158.8	39.4	50.1	69.3		124.4
1976	351.3	184.6	47.0	53.0	84.6		166.7
1977	340.6	171.5	41.4	46.5	83.6		169.1
1976							
1st qtr	83.2	44.4	11.5	12.5	20.5		38.8
2nd	86.7	46.7	11.9	13.0	21.8		40.0
3rd	78.4	41.3	10.8	12.9	17.5		37.1
4th	103.1	52.2	12.8	14.7	24.7		50.9
1977							
1st qtr	105.0	48.7	12.5	13.1	23.1		56.3
2nd	84.1	43.4	11.1	12.6	19.7		40.7
3rd	78.2	37.2	7.6	10.5	19.1		41.0
4th	73.2	42.1	10.2	10.3	21.6		31.1
1978							
1st qtr	86.7	44.9	8.5	11.1	25.3		41.8

[1] The classification of end uses was revised in January 1972, and the figures for deliveries to individual industries from the first quarter 1972 are not comparable with those for earlier years. [2] The figures refer to deliveries from the industry direct for export and may differ from the totals recorded as exports in the monthly Overseas Trade Statistics.

Deliveries of continuous filament yarns [1]

Thousand tonnes

	Total	Home: Total	Broad weaving	Carpets and rugs	Weft knitting	Warp knitting	Industrial purposes (tyres, etc)	Other purposes	Exports as yarn [2]
1968	238.4	188.9	35.3	4.7	54.9	32.0	52.2	9.8	49.4
1969	242.7	193.6	33.7	5.5	51.9	35.3	58.8	8.4	49.1
1970	254.8	198.1	28.2	7.1	63.7	38.0	53.3	7.8	56.7
1971	261.4	198.7	25.3	8.7	69.9	41.4	43.5	9.9	62.7
	Total	Home: Total	Broad weaving	Carpets and rugs	Warp knitting	Industrial purposes (tyres, etc)	Other purposes	Textured or texturing for all purposes other than carpets or industrial	Exports as yarn [2]
1972	270.1	198.7	25.1	13.4	40.4	40.8	10.0	69.0	71.4
1973	313.6	227.5	25.8	19.4	46.6	45.4	13.0	77.4	86.1
1974	259.4	188.6	22.3	14.1	35.8	35.1	11.9	69.3	70.8
1975	246.9	185.8	21.7	17.3	33.1	35.4	10.5	67.8	61.1
1976	271.2	192.4	19.5	22.2	31.1	38.3	14.8	66.6	78.8
1977	239.8	167.9	18.9	16.9	26.0	35.5	10.8	59.7	72.0
1976									
1st qtr	71.4	50.7	5.0	5.9	9.1	10.5	3.7	16.6	20.6
2nd	66.6	46.7	4.9	4.8	7.5	9.3	3.4	16.7	19.9
3rd	62.5	43.5	4.4	5.2	6.7	8.5	3.3	15.5	19.0
4th	70.7	51.4	5.2	6.3	7.8	10.0	4.4	17.8	19.3
1977									
1st qtr	64.9	45.9	5.2	5.2	7.5	9.4	3.1	15.5	19.1
2nd	60.3	41.7	4.8	3.7	6.6	9.2	2.7	14.7	18.6
3rd	54.7	37.9	4.3	3.3	5.5	8.4	2.2	14.2	16.8
4th	59.9	42.4	4.6	4.8	6.3	8.5	2.9	15.3	17.6
1978									
1st qtr	63.4	41.1	4.9	4.2	6.1	8.0	6.0	11.9	22.3

[1] The classification of end uses was revised in January 1968 and the figures for deliveries to individual industries 1968 to 1971 might not be fully comparable with those for earlier years. From January 1972 a further reclassification was introduced: deliveries of textured yarns and yarns for texturing, which were previously included in the figures for individual industries, are shown separately from the first quarter 1972. [2] The figures refer to deliveries from the industry direct for export and may differ from the totals recorded as exports in the monthly Overseas Trade Statistics.
Source: Man-made Fibres Producers Committee.

Deliveries of man-made fibres in the first quarter

Total deliveries of man-made fibres in the first quarter of 1978 were 12 per cent less than in the first quarter of 1977. Deliveries of continuous filament yarns to the home trade were 10 per cent less than in the first quarter of 1977, while deliveries of staple fibre were 8 per cent less.

Inquiries: 01-212 0017 or 01-212 6474.

Production of man-made fibres in March

In the three months ended March 1978 the volume of production of man-made fibres, seasonally adjusted, was estimated to have been 8 per cent more than in the three months ended November 1977. Total production by weight of man-made fibres in January-March 1978 was 3 per cent lower than in January-

Man-made fibre production

Thousand tonnes

	Total	Continuous filament (singles)	Staple fibre
1968	539.1	241.8	297.4
1969	553.9	252.5	301.5
1970	599.4	257.6	341.9
1971	613.1	276.4	336.7
1972	626.5	264.0	362.5
1973	730.8	305.6	425.3
1974	627.6	271.0	356.6
1975	562.5	246.5	316.0
1976	618.4	270.7	347.7
1977	551.8	239.3	312.5
1976			
1st qtr	159.8	70.0	89.8
2nd	157.5	69.7	87.7
3rd	140.4	62.4	78.0
4th	160.7	68.6	92.1
1977			
1st qtr	154.9	67.2	87.7
2nd	150.8	63.9	86.8
3rd	131.0	55.2	75.8
4th	115.1	53.0	62.1
1977			
January	49.1	20.9	28.2
February	50.3	21.8	28.5
March	55.5	24.5	31.0
April	52.3	20.8	31.5
May	47.7	21.5	26.2
June	50.8	21.7	29.2
July	49.5	20.8	28.7
August	37.6	16.0	21.6
September	43.9	18.4	25.5
October	43.5	18.2	25.4
November	36.8	17.9	18.9
December	34.8	17.0	17.8
1978			
January	44.2	19.1	25.1
February	47.6	19.0	28.7
March	58.2	22.5	35.7

Source: Production stats: Man-made Fibres Producers Committee. Index of production: Department of Industry

March 1977, output of continuous filament decreased by 10 per cent and staple fibre increased by 2 per cent.

Inquiries: 01-212 0017 or 01-212 6474

Index of the volume of production

1970 = 100

	Actual	Seasonally adjusted
1968	87	
1969	92	
1970	100	
1971	106	
1972	107	
1973	127	
1974	111	
1975	101	
1976	112	
1977	100	
1976		
1st qtr	116	115
2nd	115	112
3rd	104	110
4th	115	113
1977		
1st qtr	114	113
2nd	108	106
3rd	92	97
4th	84	83
1977		
January	106	111
February	118	113
March	118	114
April	111	107
May	103	103
June	112	106
July	100	105
August	80	91
September	94	94
October	90	87
November	86	82
December	78	81
1978		
January	94	99
February	111	105

Wool textile industry: output in February

The volume of production in the wool textile industry (as measured by the seasonally-adjusted index of production) in February 1978 was 8 per cent less than in February 1977. Statistics issued by the Wool Industry Bureau of Statistics show that in the period January to February 1978 woven fabrics (excluding blankets) were 1 per cent lower than the period January to February 1977; deliveries of worsted yarns (excluding semi-worsted yarn) were 7 per cent lower. Production of wool and hair tops was 8 per cent less and that of man-made fibre tops was 24 per cent less.

Inquiries: 01-212 0017 or 01-212 6474.

Notes to table
[1] Estimated. [2] From January 1969 includes semi-worsted yarn: previously yarn of this type was not separately distinguished and the small quantities involved were divided between the worsted yarn headings. In February deliveries of semi-worsted yarn were 0.7 million kg. [3] Woven woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components.

Analysis of production of man-made fibres in the first quarter

Production by weight of synthetic fibres in the first quarter of 1978 was 3 per cent lower than in the corresponding period of 1977 while production of viscose and acetate fibres was also 3 per cent lower. Within the total for synthetic fibres, production of continuous filament yarns was 9 per cent less and staple fibre 2 per cent more. Under the heading 'viscose and acetate' production of continuous filament yarns decreased by 13 per cent and staple fibre increased by 2 per cent compared with the first quarter 1977.

Inquiries: 01-212 0017 or 01-212 6474.

Analysis of man-made fibre production

Thousand tonnes

	Total		Continuous filament		Staple fibre	
	Synthetic	Viscose + acetate	Synthetic	Viscose + acetate	Synthetic	Viscose + acetate
1968	268.4	270.8	144.3	97.5	124.1	173.3
1969	291.4	262.5	155.9	96.6	135.5	166.0
1970	336.9	262.5	166.6	90.9	170.3	161.6
1971	357.3	255.7	191.2	85.2	166.1	170.6
1972	373.9	252.6	196.4	67.6	177.5	185.0
1973	453.9	277.0	233.0	72.6	220.9	204.4
1974	396.1	231.5	200.3	70.7	195.8	160.8
1975	361.1	201.4	184.0	62.5	177.1	138.9
1976	414.2	204.2	200.1	70.6	214.1	133.6
1977	358.8	193.0	170.7	62.6	182.1	130.4
1976						
1st qtr	104.2	55.6	52.0	18.0	52.2	37.6
2nd	105.1	52.4	52.0	17.7	53.1	34.7
3rd	97.8	42.6	46.2	16.2	51.6	26.4
4th	107.2	53.5	49.9	18.6	57.3	34.8
1977						
1st qtr	102.7	52.2	49.3	17.9	53.4	34.3
2nd	98.9	51.9	47.8	16.1	51.1	35.8
3rd	82.7	48.3	40.9	14.3	41.8	34.0
4th	74.5	40.6	38.7	14.3	35.8	26.3
1978						
1st	99.6	50.4	45.0	15.5	54.6	34.9

The heading 'Viscose + acetate' includes triacetate.

Output in the wool textile industry

	Consumption	Production			Deliveries			
	Raw wool (clean weight)	Tops		Woollen yarn[1]	Worsted yarn[2]	Woven fabrics (excluding blankets)[1]		Blankets[3]
		Wool and hair	Man-made fibres			Woollen	Worsted	
	million kg					million sq m		
1968	177.5	96.6	36.4	147.4	98.2	135.8	110.6	27.3
1969	174.5	92.0	42.2	142.2	100.5	130.1	109.2	26.9
1970	153.1	79.7	44.6	129.4	97.6	115.5	99.8	24.6
1971	141.2	66.2	36.6	130.7	93.0	101.9	83.9	28.5
1972	152.3	75.1	45.9	130.9	101.6	99.8	83.7	28.8
1973	136.6	62.2	55.9	135.2	100.0	104.0	88.4	30.6
1974	112.6	43.9	54.8	122.5	87.2	92.1	82.6	28.1
1975	110.6	46.8	44.4	112.1	75.5	76.8	74.6	24.7
1976	119.7	56.5	47.2	108.0	80.8	73.6	69.4	22.8
1977	113.6	52.3	45.3	105.7	81.2	75.5	71.3	22.2
1976								
1st qtr	31.0	13.8	11.6	29.4	20.6	16.9	18.2	6.5
2nd	30.5	14.5	12.1	27.9	20.3	19.6	16.9	4.4
3rd	27.6	13.4	10.6	23.7	18.2	19.4	16.9	5.2
4th	30.6	14.6	13.0	27.0	21.7	17.9	17.5	6.5
1977								
1st qtr	32.4	15.3	12.6	29.0	23.1	19.6	18.8	6.7
2nd	29.8	13.9	11.9	27.2	20.2	21.1	18.1	4.8
3rd	24.5	11.1	10.4	23.0	17.5	19.7	16.4	4.4
4th	26.8	12.0	10.4	26.5	20.4	18.4	18.0	6.2
1977								
January	10.3	5.0	4.0	9.0	7.2	5.8	5.9	2.4
February	10.2	4.8	4.0	9.1	7.5	6.2	6.0	2.2
March	11.9	5.5	4.6	10.8	8.4	7.6	6.9	2.1
April	9.6	4.6	3.8	8.6	6.4	6.6	5.7	1.7
May	11.1	5.2	4.7	10.0	7.6	7.4	6.6	1.6
June	9.1	4.1	3.4	8.6	6.2	7.1	5.8	1.5
July	7.9	4.2	3.9	6.5	5.6	6.0	5.2	1.1
August	7.6	2.9	2.9	8.4	5.4	6.5	5.2	1.6
September	9.0	4.0	3.6	8.2	6.5	7.2	6.0	1.7
October	9.1	3.9	4.4	9.2	7.1	6.9	6.4	2.0
November	9.7	4.5	3.6	9.5	7.4	6.7	6.5	2.1
December	8.0	3.6	2.4	7.8	5.9	4.8	5.1	2.1
1978								
January	9.7	4.5	3.0	9.3	6.9	6.0	5.8	2.2
February		4.5	3.1	8.8	6.7	5.9	6.0	1.5

Made-up clothing: orders and deliveries in January

In the three months ended January 1978 deliveries by the clothing industry were provisionally estimated to have been 5 per cent higher than in the preceding three months while net new orders were 6 per cent higher. Orders-on-hand at the end of January 1978 were 2 per cent higher than the end-October 1977 level. (These comparisons are based on the seasonally adjusted series in the accompanying tables.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years.

Inquiries: 01-212 0116.

Made-up clothing

Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1969 = 100		Average 1970 Deliveries = 100		Average 1970 Deliveries = 100	
1968	107		100		97	
1969	100		97		97	
1970	103		102		100	
1971	119		108		104	
1972	125		110		109	
1973	155		123		117	
1974	145		115		114	
1975	142		118		115	
1976	135		118		114	
1977 p	139		123		120	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1975						
1st qtr	135	141	116	123	116	121
2nd	165	151	133	119	114	113
3rd	129	139	97	115	114	114
4th	142	141	128	118	116	113
1976						
1st qtr	126	132	109	111	113	114
2nd	148	135	126	116	107	109
3rd	134	145	108	128	121	120
4th	135	134	129	117	118	114
1977						
1st qtr	145	151	127	130	122	124
2nd	154	140	123	116	115	120
3rd p	130	140	112	134	120	120
4th p	139	138	131	125	124	122
1976						
Jan	129	134	94	112	102	122
Feb	128	135	115	112	116	112
Mar	126	132	117	110	119	109
Apr	132	129	128	118	105	107
May	151	133	149	123	111	117
Jun	148	135	101	108	103	104
Jul	147	145	102	139	117	121
Aug	136	143	88	118	108	119
Sep	134	145	135	128	136	121
Oct	132	137	151	115	133	113
Nov	138	135	141	116	123	114
Dec	135	134	94	120	99	115
1977						
Jan	143	148	113	135	108	129
Feb	139	147	127	123	129	124
Mar	145	151	140	131	129	119
Apr	153	150	133	123	115	118
May	161	143	136	107	116	117
Jun	154	140	101	119	113	125
Jul p	138	136	110	149	121	125
Aug p	131	138	95	128	107	118
Sep p	130	140	133	125	132	117
Oct p	129	135	145	111	141	120
Nov p	136	133	135	111	125	116
Dec p	139	138	114	153	106	131
1978						
Jan p	133	138	103	122	107	127

p Provisional.

Turnover of the motor trades: first quarter

The total turnover of the motor trades in the first quarter of 1978 was 28 per cent higher than in the first quarter of 1977. On the same comparison, new vehicle sales increased by 45 per cent, used vehicle sales increased by 24 per cent and other sales and receipts (which include sales of petrol and oil, tyres, spares and accessories and receipts from servicing and repairs) rose by 15 per cent.

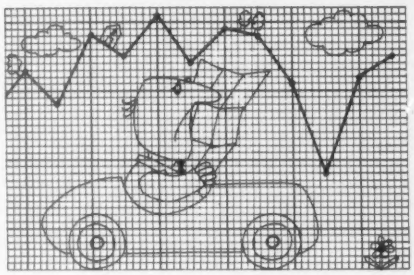
The statistics are of turnover at current prices. Movements therefore include the effect of price changes, including changes in purchase tax before the second quarter of 1973, the introduction of VAT and car tax from the second quarter of 1973, the introduction of VAT on petrol from the second quarter of 1974, and subsequent changes in the rates of VAT. The turnover includes transactions between dealers in addition to final sales. Vehicles include commercial vehicles as well as private cars and motor cycles.

The estimates for Q4 1977 have been revised to take account of additional information from late returns.

The figures are not seasonally adjusted.

The returns made by a voluntary panel are used to project the figures of turnover in a base year (1972) obtained in a comprehensive inquiry to motor traders.

Inquiries: 01-215 3177.



Turnover of the motor trades: index numbers

Index numbers of turnover per quarter at current prices (including purchase tax or VAT and car tax)

Percentage change compared with a year earlier in brackets — 1972 = 100

	Total turnover	New vehicle sales	Used vehicle sales	Other sales
Turnover in 1972 (£ million)	(8,109)	(3,089)	(1,373)	(3,647)
1972	100	100	100	100
1973	111 (+11)	110 (+10)	102 (+2)	115 (+15)
1974	119 (+7)	106 (−3)	100 (−2)	137 (+19)
1975	143 (+20)	123 (+16)	128 (+28)	166 (+21)
1976	174 (+22)	159 (+29)	158 (+24)	192 (+16)
1977 (revised)	212 (+22)	202 (+27)	195 (+23)	228 (+18)
1972				
1st qtr	95	94	100	93
2nd	105	109	107	101
3rd	102	101	103	104
4th	98	96	90	102
1973				
1st qtr	117 (+23)	126 (+34)	119 (+18)	109 (+17)
2nd	110 (+5)	110 (+1)	103 (−3)	113 (+12)
3rd	114 (+12)	111 (+10)	108 (+5)	119 (+15)
4th	102 (+4)	93 (−3)	80 (−12)	118 (+16)
1974				
1st qtr	108 (−8)	102 (−20)	87 (−27)	120 (+10)
2nd	122 (+11)	112 (+2)	106 (+3)	136 (+20)
3rd	126 (+11)	110 (−1)	111 (+3)	146 (+22)
4th	121 (+18)	102 (+10)	95 (+20)	147 (+24)
1975				
1st qtr	137 (+27)	127 (+25)	116 (+33)	152 (+27)
2nd	148 (+21)	129 (+15)	136 (+27)	168 (+23)
3rd	152 (+21)	131 (+19)	143 (+29)	174 (+19)
4th	135 (+12)	105 (+3)	117 (+23)	168 (+15)
1976				
1st qtr	166 (+22)	161 (+27)	153 (+32)	175 (+15)
2nd	176 (+19)	162 (+25)	170 (+26)	189 (+12)
3rd	178 (+17)	159 (+22)	167 (+17)	199 (+15)
4th	176 (+30)	155 (+48)	143 (+22)	205 (+22)
1977				
1st qtr	203 (+22)	199 (+23)	189 (+24)	211 (+21)
2nd	210 (+20)	197 (+22)	196 (+15)	226 (+19)
3rd	230 (+29)	220 (+39)	215 (+29)	243 (+22)
4th (revised)	207 (+18)	191 (+23)	179 (+25)	230 (+12)
1978				
1st qtr	258 (+28)	288 (+45)	234 (+24)	242 (+15)

Foreign arrivals in the United Kingdom

Arrivals in February 1978

During February 1978 the number of arrivals of foreign nationals entering the United Kingdom was 418 000, according to figures from the Department of Trade and the British Tourist Authority. This figure represents a decrease of 10 per cent over the same month of 1977. Arrivals for the first two months of the year totalled 851 000, a decrease of 6 per cent over the corresponding period of 1977.

The overall picture gained from February's figures, coupled, with those since November of 1977 is of a continued easing of the tourist flow from a peak reached in the first half of last year.

The figures include all nationals of the EEC countries except the Irish Republic, and all other foreign nationals, but Commonwealth citizens are excluded. The figures are based on Home Office returns of passengers entering the United Kingdom. (For details of categories included see notes 1 and 2 at the end of the article.)

Arrivals of nationals of EEC countries in February were 217 000, 17 per cent below the figures for February 1977. The largest decreases were of French nationals (down 29 per cent), nationals of Belgium/Luxembourg (down 20 per cent) and those of the Netherlands (down 15 per cent). The numbers of arrivals of each of the other EEC countries showed reductions, except those of Italy which increased by 11 per cent. It should be noted that there was a particularly high number of EEC arrivals in February 1977. Total arrivals for the first two months of 1978 showed an overall reduction of 11 per cent, from 484 000 in 1977 to 429 000.

The number of nationals of countries of the rest of western Europe arriving in the United Kingdom during February was 73 000 compared with 89 000 for February 1977, a decrease of 18 per cent. Every country showed a reduction, with the largest decreases being of nationals of Turkey (down 32 per cent), Greece (down 27 per cent), Norway (down 23 per cent), and Portugal (down 18 per cent). The smallest reduction was in nationals of Yugoslavia (down 3 per cent), although the numbers are small. As in the case with arrivals of nationals of EEC countries, this reduction is against a very high number recorded in February 1977. Total arrivals for the first two months of 1978 of nationals of the rest of Western Europe showed an overall reduction of 13 per cent, from 173 000 in 1977 to 150 000.

Arrivals of nationals of the United States arriving in the United Kingdom during February increased by 7 per cent to 60 000 compared with 56 000 for the equivalent month of 1977. There was also an increase of 8 per cent in the number of United States nationals arriving in the first two months of the year, from 124 000 in 1977 to 134 000.

The number of nationals of other foreign countries arriving in the United Kingdom during February increased by 11 per cent, compared with February 1977, to 68 000. Total arrivals for the first two months of the year of nationals of other foreign countries increased by 9 per cent from 127 000 in 1977 to 138 000. These increases are mainly due to arrivals of nationals of Latin America (up 26 per cent) from 20 000 in 1977 to 25 000, although arrivals of nationals of Japan in February showed a decrease of 1 per cent compared with February 1977, and for the first two months of 1978 a decrease of 3 per cent, from 26 000 in 1977 to 25 000.

Notes

1 The figures, collected by the Home Office, record the number of journeys made, so that a person who makes more than one journey is counted on each occasion. The figures for any particular country relate not to the place from which the passenger travelled, but to the fact that he or she was a foreign national admitted on the basis of holding a passport of that country.

2 Figures for the nationals of non-EEC countries include stateless persons, while an estimated addition has been made to the Home Office figures for the appreciable number of United States passengers arriving via the Irish Republic. No further additions have been made for any other arrivals from the Republic. All figures for non-EEC arrivals relate to visitors given leave to enter for less than 12 months, ie holidaymakers, business visitors, people coming to stay as guests of relatives or friends, other tourists, and those coming for permit-free employment for less than 12 months, and also include passengers given leave to enter for any period for the purpose of taking up a course of study. These categories comprise approximately 90 per cent of all arrivals. For EEC countries, all arrivals are shown, irrespective of the passengers' purpose of visit or expected length of stay. This follows the entry of the United Kingdom into the EEC, since when citizens of community countries are generally admitted to the United Kingdom without having to state their purpose of visit or expected length of stay.

3 Seasonally adjusted figures: simple comparisons of monthly figures between one year and another, or between adjacent months, must be interpreted with caution. The seasonally adjusted figures may provide a better basis for comparison with other months or for judging current trends. In estimating the seasonal adjustments, allowance has been made for changes in the seasonal pattern, which have been in the direction of a spreading of the tourist season, with some reduction in the summer peak relative to the rest of the year. Adjustment was also made for the effect of the varying date of Easter on numbers of western European arrivals.

The seasonally adjusted series are liable to revision when subsequent figures become available and should therefore, for the most recent months, be viewed with caution.

Inquiries: 01-212 5555.

Foreign arrivals

Thousands per month

	Total arrivals of nationals of EEC countries (excluding Irish Republic) [1]		Foreign arrivals from non-EEC countries [2]							
			Nationals of rest of western Europe (non-EEC)		Nationals of United States		Nationals of other foreign countries		Total nationals of non-EEC countries	
1968	144		34		73		29		136	
1969	174		40		95		35		170	
1970	199		47		117		41		205	
1971	214		53		129		46		228	
1972	232		59		134		51		244	
1973	265		70		131		62		263	
1974	280		75		107		68		250	
1975	314		87		99		80		267	
1976	379		113		121		89		322	
1977	438		133		144		107		383	
1977	UA	SA	UA	SA	UA	SA	UA	SA	UA	SA
January	224	423	84	144	68	142	66	100	217	385
February	260	499	89	146	56	138	61	103	206	387
March	355	423	113	139	85	136	85	106	283	381
April	495	456	149	141	123	144	79	103	352	388
May	490	447	125	141	181	152	94	107	400	400
June	489	439	157	131	231	154	128	112	516	397
July	927	457	270	135	245	141	202	111	717	387
August	669	433	155	125	212	141	181	110	548	376
September	410	419	128	121	196	134	135	105	459	360
October	395	438	131	128	158	163	99	106	387	399
November	278	430	101	123	87	136	79	114	266	373
December	266	394	90	118	83	144	74	105	246	367
1978										
January	212	402	77	131	74	152	70	106	221	389
February	217	416	73	119	60	146	68	113	201	378
Jan-Feb 1977	484		173		124		127		908	
Jan-Feb 1978	429		150		134		138		851	

[1] Total arrivals: All nationals of EEC countries admitted to the UK irrespective of intended length of stay or purpose excluding Irish Republic. [2] Foreign arrivals (non-EEC): Nationals of countries other than EEC or the Commonwealth admitted for less than one year for selected purposes – see notes. UA = Unadjusted Home Office. SA = Seasonally adjusted Department of Trade.

Index of retail prices for April

The index of retail prices for all items for 18 April was 194.6 (15 January 1974 = 100). This represents an increase of 1.5 per cent on March 1978 (191.8) and of 7.9 per cent on April 1977 (180.3).

The rise in the index in April was due mainly to increases in local rates and water charges, rents and other housing costs; to increases in the prices of some foods, particularly vegetables, meat and bread; and to increases in the prices of cars, alcoholic drinks and meals bought and consumed outside the home.

Inquiries: Watford 28500 ext. 630.

Table 2 Index of retail prices: commodity breakdown

	Indices (15 Jan 1974 = 100)		Percentage change over the month
	14 Mar 1978	18 Apr 1978	
All items	191.8	194.6	+1.5
All items excluding food	189.9	192.7	+1.5
Food	198.4	201.6	+1.6
Seasonal food	179.0	186.3	+4.1
Other food	202.2	204.7	+1.2
Alcoholic drink	194.8	196.6	+0.9
Tobacco	222.8	224.2	+0.6
Housing	162.3	170.6	+5.1
Fuel and light	222.0	223.6	+0.7
Durable household goods	178.8	180.1	+0.7
Clothing and footwear	167.9	169.1	+0.7
Transport and vehicles	201.8	203.3	+0.7
Miscellaneous goods	200.5	203.4	+1.4
Services	188.8	190.1	+0.7
Meals out	201.7	203.9	+1.1

Table 1 Index of retail prices

	All items				All items except seasonal food		
	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months	12 months	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months
1977							
November	187.4	+0.5	+3.1	+13.0	188.2	+0.5	+4.3
December	188.4	+0.5	+2.6	+12.1	189.0	+0.4	+3.6
1978							
January	189.5	+0.6	+3.1	+9.9	190.2	+0.6	+3.7
February	190.6	+0.6	+3.2	+9.5	191.4	+0.6	+3.5
March	191.8	+0.6	+3.3	+9.1	192.4	+0.5	+3.3
April	194.6	+1.5	+4.3	+7.9	195.0	+1.4	+4.1

Average earnings in March and basic rates of wages in April

Indices of average earnings

Average earnings of employees in all industries and services in Great Britain are estimated to have risen by about 10.1 per cent between March 1977 and March 1978. This estimate is based on the new series of monthly index numbers of average earnings for the whole economy which was introduced from January 1976.

Over this 12 month period, average earnings in production and other industries covered by the older series, introduced from January 1963, increased by about 11.0 per cent.

The figures for recent months are:

New series (whole economy) Not seasonally adjusted

	Index Jan 1976 = 100	Percentage increase over previous 12 months
1977		
September	116.6	7.7
October	117.9	8.7
November	120.1	8.6
December	121.7	9.4
1978		
January	121.5	9.5
February	122.7	10.5
March p	124.8	10.1

p Provisional.

Indices of basic rates of wages

At the end of April 1978, nationally-negotiated basic weekly rates of wages of manual workers were on average 14.1 per cent higher than a year earlier.

During April, the index of basic weekly rates increased from 238.0 to 256.4.

The figures for recent months are:

	Indices, 31 July 1972 = 100		Percentage increases over previous 12 months	
	Basic weekly rates	Basic hourly rates	Basic weekly rates	Basic hourly rates
1977				
30 November	231.1	232.5	5.4	5.4
31 December	232.9	234.3	5.8	5.8
1978				
31 January	236.4	237.9	6.3	6.3
28 February	237.7	239.2	6.3	6.3
31 March	238.0	239.5	6.3	6.3
30 April	256.4	257.9	14.1	14.1

The indices only take account of changes in nationally-negotiated rates. The year-on-year increases consequently reflect that new national rates for engineering workers became effective in April after remaining unchanged from February 1976.

Inquiries: Watford 28500 ext. 319.

Older series (production industries and some services)

	Seasonally adjusted			Unadjusted index January 1970 = 100
	Index January 1970 = 100	Percentage increase Over previous month	Over previous 12 months	
1977				
September	291.0	1.1	9.1	292.4
October	295.8	1.6	9.6	296.6
November	300.5	1.6	10.3	304.5
December	304.8	1.4	10.6	304.8
1978				
January	306.3	0.5	10.2	306.5
February	311.2	1.6	11.5	311.0
March p	314.2	1.0	11.0	316.7

p Provisional.

House prices up 10½ per cent on last year

The average price of dwellings on which new mortgages were approved in the first quarter of 1978 was about £14,710. Compared with the fourth quarter of 1977 the average price was 4½ per cent higher when allowance has been made for normal seasonal movements, or 2½ per cent in unadjusted terms. Compared with the same period a year ago, prices were 10½ per cent higher.

For new dwellings, the average price in the first quarter of 1978 was about £16,190, 5 per cent higher than in the previous quarter (7 per cent, allowing for normal seasonal movements), and 16 per cent higher than a year earlier.

Secondhand dwellings

For secondhand dwellings, the average price was about £14,420, 2 per cent higher than in the previous quarter (3½ per cent, allowing for normal seasonal movements), and 9½ per cent higher than a year earlier.

The average mortgage advance approved for all dwellings in the first quarter of 1978 was about £10,050, or 68½ per cent of the average price. This compares with 66½ per cent in the fourth quarter of 1977 and 63½ per cent recorded a year ago.

Inquiries: 01-212 3490.

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Cinema admissions and takings in February 1978

During February, counted as a four-week period the weekly average of admissions to cinemas in Great Britain was 2.33 million and the weekly average of gross box office takings was £2.04 million. The comparable figures for February 1977 were 2.19 million and £1.79 million.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 19 May 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Walk On	BR/E 39583/21/5/83	23	15 May	Cinema International Corporation (UK)	Red Oak Television Ltd
The Stick Up	BR/E 39614/21/5/83	101	17 May	Trident-Barber Distributors Ltd	Backstage Productions Ltd
Bovver Boots	BR/E 39616/21/5/83	26	19 May	Columbia-Warner Distributors Ltd	Thorntip Ltd
Prey	BR/E 39619/21/5/83	84	19 May	Supreme Film Distributors Ltd	Tymar Film Productions Ltd
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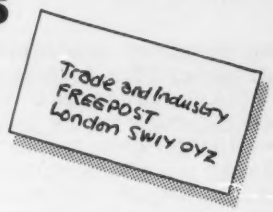

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ISBN 0 11 725273 5
ISSN 0006-5323